User Manual

April 2015

Code for Sustainable Homes

Automated Assessment Processing System

www.thecsh.co.uk

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1 About this guide

We are continually improving the CSH Automated Assessment Processing System, and therefore, some of the screens in this manual may not reflect the latest changes.

Any comments or suggested improvements regarding this user guide can be emailed to the CSH mailbox at csh@bre.co.uk

2 Introduction to our Automated Assessment Processing System

This User Manual provides licensed BRE Global Code for Sustainable Homes (CSH) assessors with a step by step guide to using the new Automated Assessment Processing System.

Historically, all BREEAM assessments were completed using a paper based system supported by a spreadsheet tool.

The new system is a web based software tool which can be accessed from any internet enabled computer platform. It has been designed to substantially reduce the time taken for issuing CSH certificates.

The system will enable assessors to manage all of their CSH assessments from the registration stage through to issuing the final certificate.

Licensed assessors can register an assessment, complete and submit reports using the system. After the assessment has been certified, electronic copies of certificates can be downloaded from the system.

2.1 Who can use the system

Only CSH Assessors licensed by BRE Global can have access to this system.

Licensed assessors can register for a system user account via the “Register a New Account” button, located on the system home page, at www.thecsh.co.uk. A license check will then be carried out by BRE, before the account is verified, and system access granted.

If an assessors license lapses, system access will be disabled, until the license is renewed/

2.2 Overview of system features

This new system will enable licensed assessors to:

- Register new Design Stage (DS) and Post Construction Stage (PCS) assessments.
- Complete and submit DS and PCS reports.
- Monitor the status of DS and PCS assessments.

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- Download copies of DS and PCS certificates.

2.3 System queries and support

- For support with the CSH Assessment Processing System, please refer to this guide in the first instance.

2.4 Technical guidance

- For **technical guidance** and general queries relating to the Code for Sustainable Homes (including help and support with using the Automated Assessment Processing System) please call;

0333 321 811

- Telephone lines open Monday to Friday 9am to 5pm.

2.5 Email

- Emails should be sent to breeam@bre.co.uk

2.6 Related documents

- BRE CSH Operations Manual (available via the BREEAM extranet)

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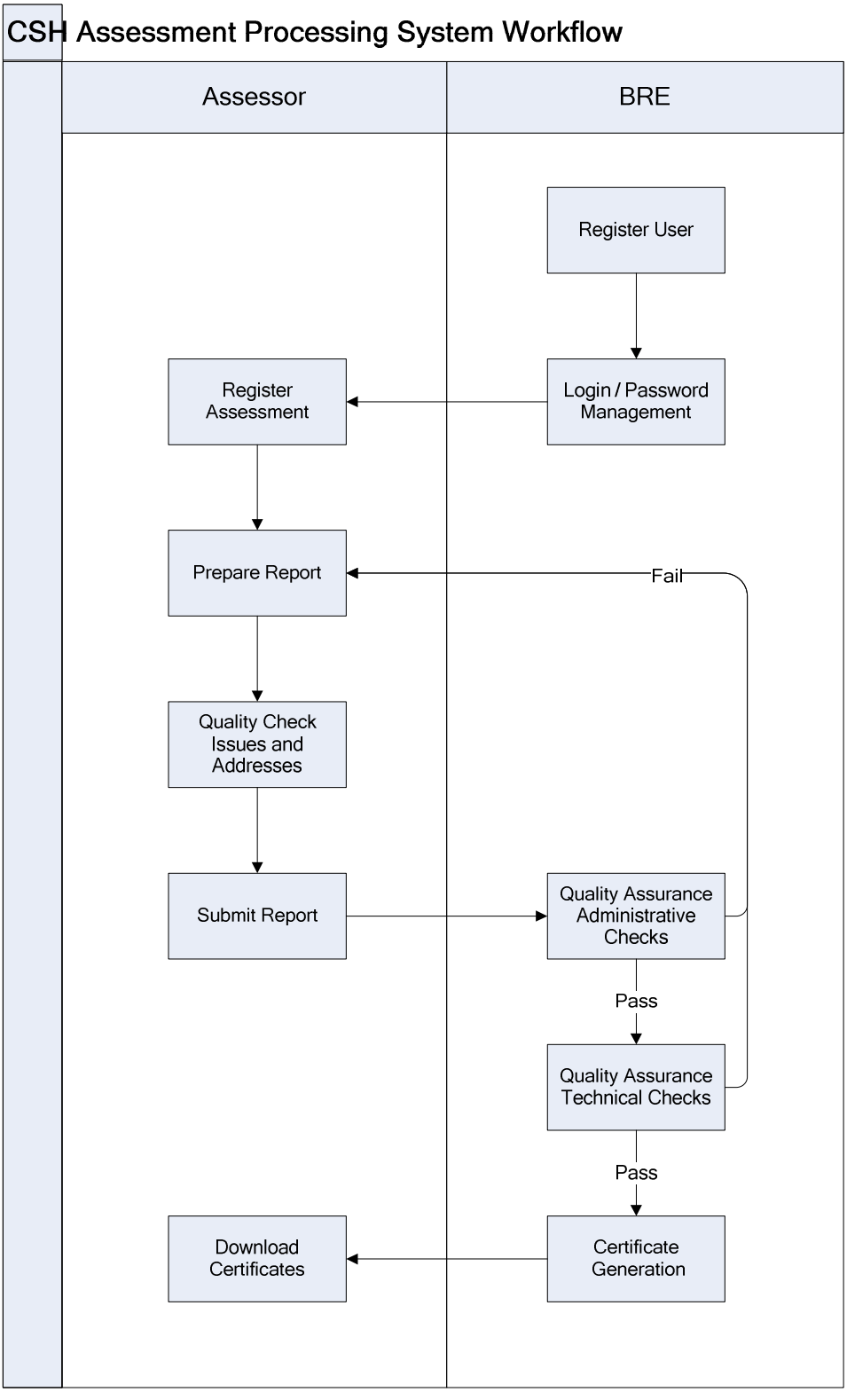
3 Assessment workflow diagrams

3.1 Overall CSH workflow diagram



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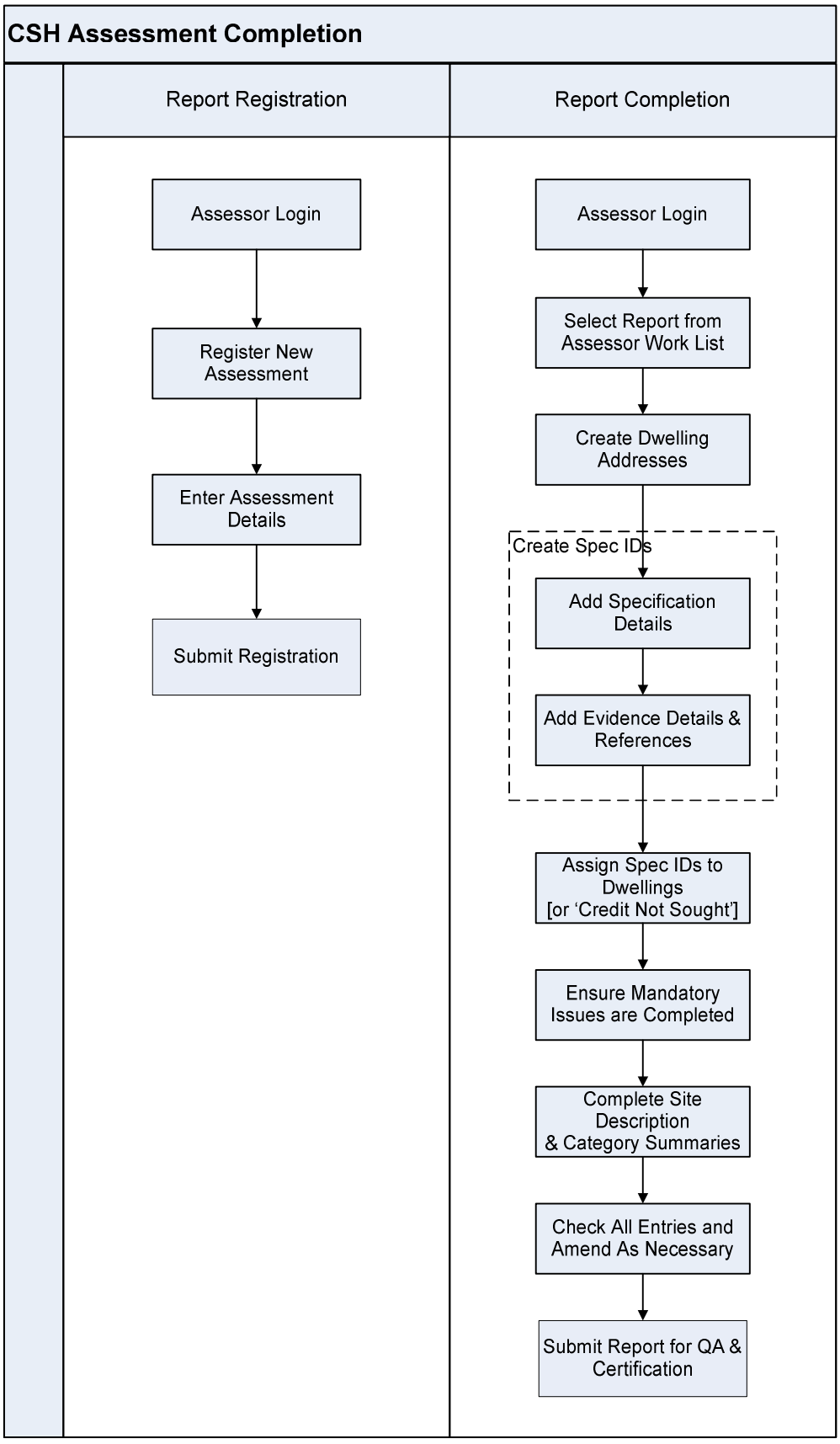
3.2 Registration and report completion workflow diagram


CSH Assessment Completion
Report Registration
Report Completion
Assessor Login
Register New Assessment
Enter Assessment Details
Submit Registration
Assessor Login
Select Report from Assessor Work List
Create Dwelling Addresses
Create Spec IDs
Add Specification Details
Add Evidence Details & References
Assign Spec IDs to Dwellings [or 'Credit Not Sought']
Ensure Mandatory Issues are Completed
Complete Site Description & Category Summaries
Check All Entries and Amend As Necessary
Submit Report for QA & Certification

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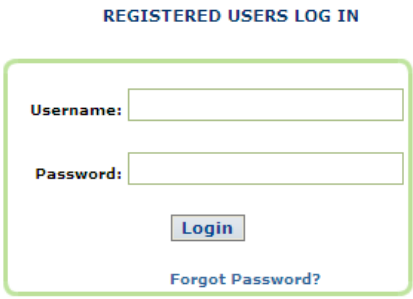
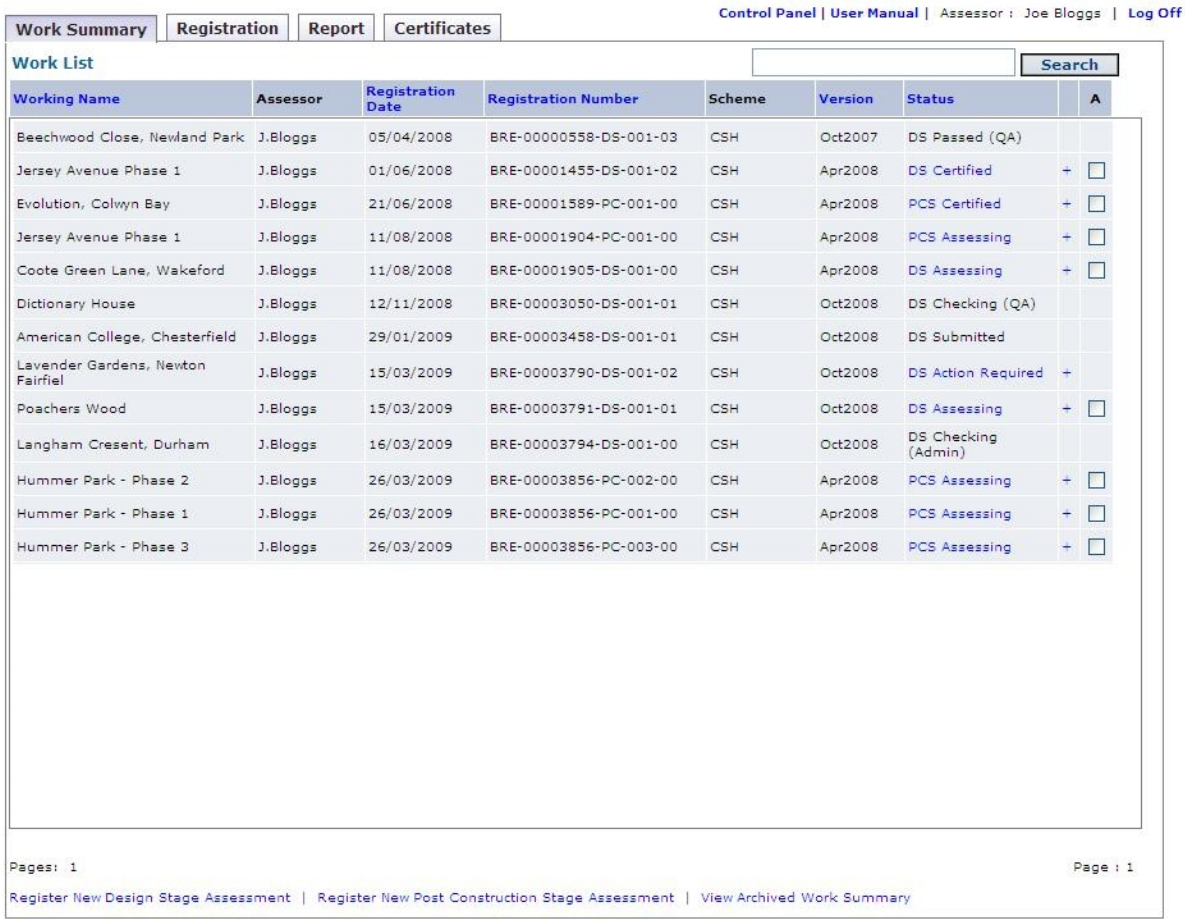
4 Logging onto the system

- Open your internet browser and go to this address www.thecsh.co.uk
- Enter your **Username.**
- Enter your **Password.**
- Click the **Login** button.
-
- Your personal **Work Summary** page will then be displayed:



Please Note ! Keep your password secure. Do not allow any other person to know your password or to use your CSH Automated Assessment Processing System account.

4.1 Work summary


Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name | Assessor | Registration Date | Registration Number | Scheme | Version | Status | A
Beechwood Close, Newland Park | J.Bloggs | 05/04/2008 | BRE-00000558-DS-001-03 | CSH | Oct2007 | DS Passed (QA)
Jersey Avenue Phase 1 | J.Bloggs | 01/06/2008 | BRE-00001455-DS-001-02 | CSH | Apr2008 | DS Certified
Evolution, Colwyn Bay | J.Bloggs | 21/06/2008 | BRE-00001589-PC-001-00 | CSH | Apr2008 | PCS Certified
Jersey Avenue Phase 1 | J.Bloggs | 11/08/2008 | BRE-00001904-PC-001-00 | CSH | Apr2008 | PCS Assessing
Coote Green Lane, Wakeford | J.Bloggs | 11/08/2008 | BRE-00001905-DS-001-00 | CSH | Apr2008 | DS Assessing
Dictionary House | J.Bloggs | 12/11/2008 | BRE-00003050-DS-001-01 | CSH | Oct2008 | DS Checking (QA)
American College, Chesterfield | J.Bloggs | 29/01/2009 | BRE-00003458-DS-001-01 | CSH | Oct2008 | DS Submitted
Lavender Gardens, Newton Fairfiel | J.Bloggs | 15/03/2009 | BRE-00003790-DS-001-02 | CSH | Oct2008 | DS Action Required
Poachers Wood | J.Bloggs | 15/03/2009 | BRE-00003791-DS-001-01 | CSH | Oct2008 | DS Assessing
Langham Cresent, Durham | J.Bloggs | 16/03/2009 | BRE-00003794-DS-001-00 | CSH | Oct2008 | DS Checking (Admin)
Hummer Park - Phase 2 | J.Bloggs | 26/03/2009 | BRE-00003856-PC-002-00 | CSH | Apr2008 | PCS Assessing
Hummer Park - Phase 1 | J.Bloggs | 26/03/2009 | BRE-00003856-PC-001-00 | CSH | Apr2008 | PCS Assessing
Hummer Park - Phase 3 | J.Bloggs | 26/03/2009 | BRE-00003856-PC-003-00 | CSH | Apr2008 | PCS Assessing
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

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- The **Work Summary** page (above) displays a table detailing all assessments that are currently assigned to you.

- The **Status** column shows which stage of the reporting process the assessment is at.

Status	Description
DS/ PCS Assessing	Report registered and available to edit before submission for QA and certification
DS/ PCS Submitted	Report submitted for QA
DS/ PCS Certified	Design Stage Certificate Generated
DS/ PCS Checking (Admin)	Report in QA procedure
DS/ PCS Checking (QA)	Report in QA procedure
DS/ PCS Passed	Report passed QA procedure
DS/ PCS Action Required	Report failed QA (admin or credit check) procedure
DS/ PCS Resubmitted	Report submitted after QA failure corrections
DS/ PCS Certifying	Design Stage Certificates being Generated
DS/ PCS Expired	Scheme version for report has expired

Please Note ! The report can only be completed or amended when the status is **DS/ PCS Assessing**, or **DS/ PCS Action Required.**

- You have the option to create new reports, and view or amend existing reports from here.

4.2 System time out

- After approximately 10 minutes of system inactivity (i.e. no button clicks) the system will automatically log you out. You will be required to log in again to access your records.

4.3 The control panel

- A link titled Control Panel exists at the top of all pages within the system.

Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing
Dictionary House J.Bloggs 12/11/2008 BRE-00003050-DS-001-01 CSH Oct2008 DS Checking (QA)

- When opened, this link takes the user to the Control Panel main page

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THE CODE FOR SUSTAINABLE HOMES
Design Stage & Post Construction Stage Assessment Online
THE CODE FOR SUSTAINABLE HOMES™
HOME
ABOUT THE CODE
HOW THE CODE WORKS
BECOME AN ASSESSOR
CONTACT US
USER - CONTROL PANEL
Name: Mr.Joe Bloggs
CSH User Type: Assessor
Edit My Registration Details
To Update your Registration Details, Please click on the button below
EDIT
Change My Password
To Update/Change your Password, Please click on the button below
EDIT
Summary Reports
To generate/create some Summary Reports, Please click on the button below
VIEW
Manage Assessment Report
To Manage your Assessment Reports, Please click on the button below
VIEW
Latest System Updates - March 2009
Terms, Conditions and Privacy policy
© Copyright BRE Global 2008

- Once on the **Control Panel** main page, the user can perform a number of functions:
    - **Edit Registration Details -** This allows the user to edit their account details, including their username.
    - **Change My Password –** This option allows the user to change their password.
    - **Summary Reports –** More detail will be released on this in the future
    - **Latest System Updates –** This link takes the user to a screen that shows the latest system updates that have occurred on the CSH system
- In order to return to the work summary screen, please click on the **Manage Assessment Report** option

4.4 Logging out

- It is important for data security that you do not remain logged in to the system if leaving your personal computer unattended. (The system will automatically log you out after approximately 10 minutes of system inactivity).

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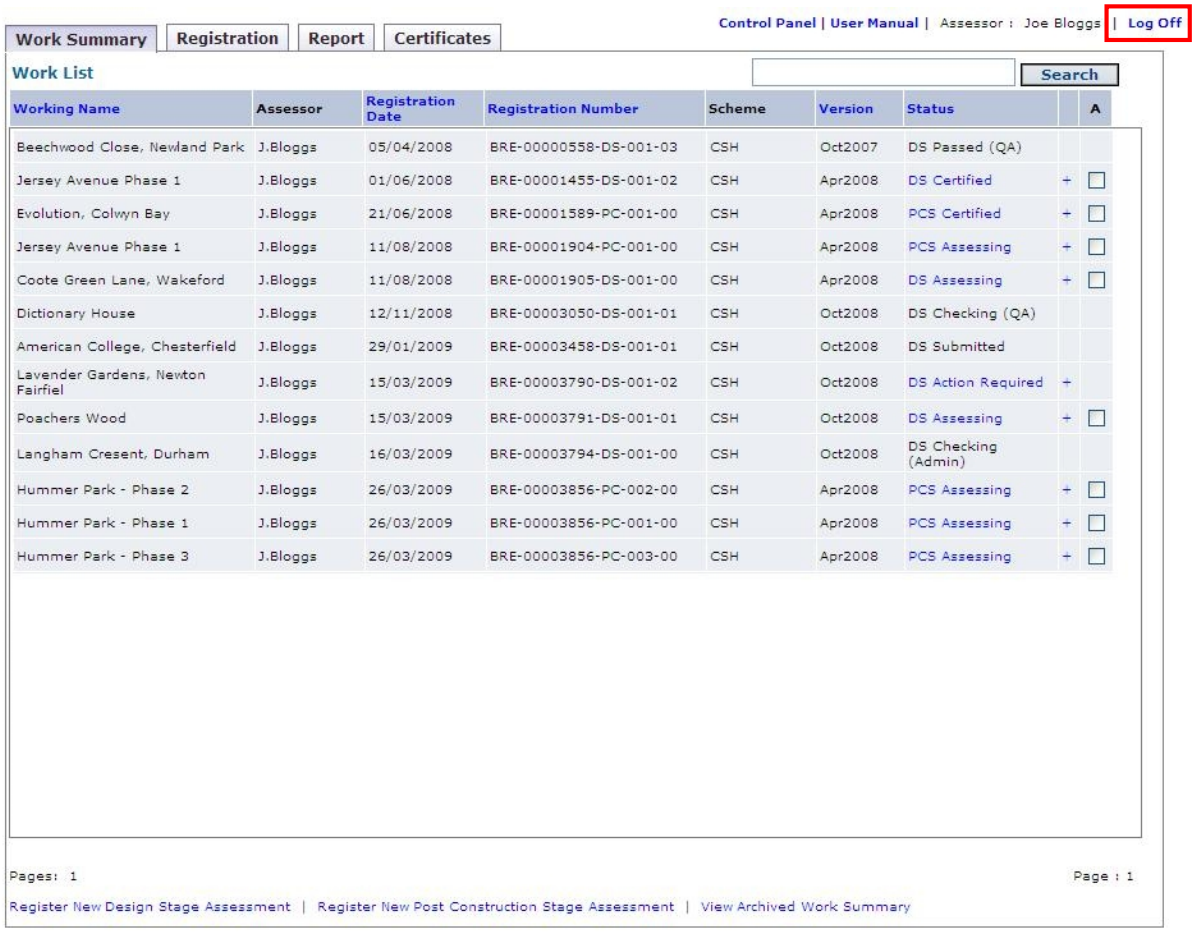
- Before logging out, ensure your work is saved by clicking the **Update** or **Save** button on the page you are using.
- Click on the **Log Off** text at the top right hand corner of the page:


Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
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Lavender Gardens, Newton Fairfiel J.Bloggs 15/03/2009 BRE-00003790-DS-001-02 CSH Oct2008 DS Action Required
Poachers Wood J.Bloggs 15/03/2009 BRE-00003791-DS-001-01 CSH Oct2008 DS Assessing
Langham Cresent, Durham J.Bloggs 16/03/2009 BRE-00003794-DS-001-00 CSH Oct2008 DS Checking (Admin)
Hummer Park - Phase 2 J.Bloggs 26/03/2009 BRE-00003856-PC-002-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 1 J.Bloggs 26/03/2009 BRE-00003856-PC-001-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 3 J.Bloggs 26/03/2009 BRE-00003856-PC-003-00 CSH Apr2008 PCS Assessing
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

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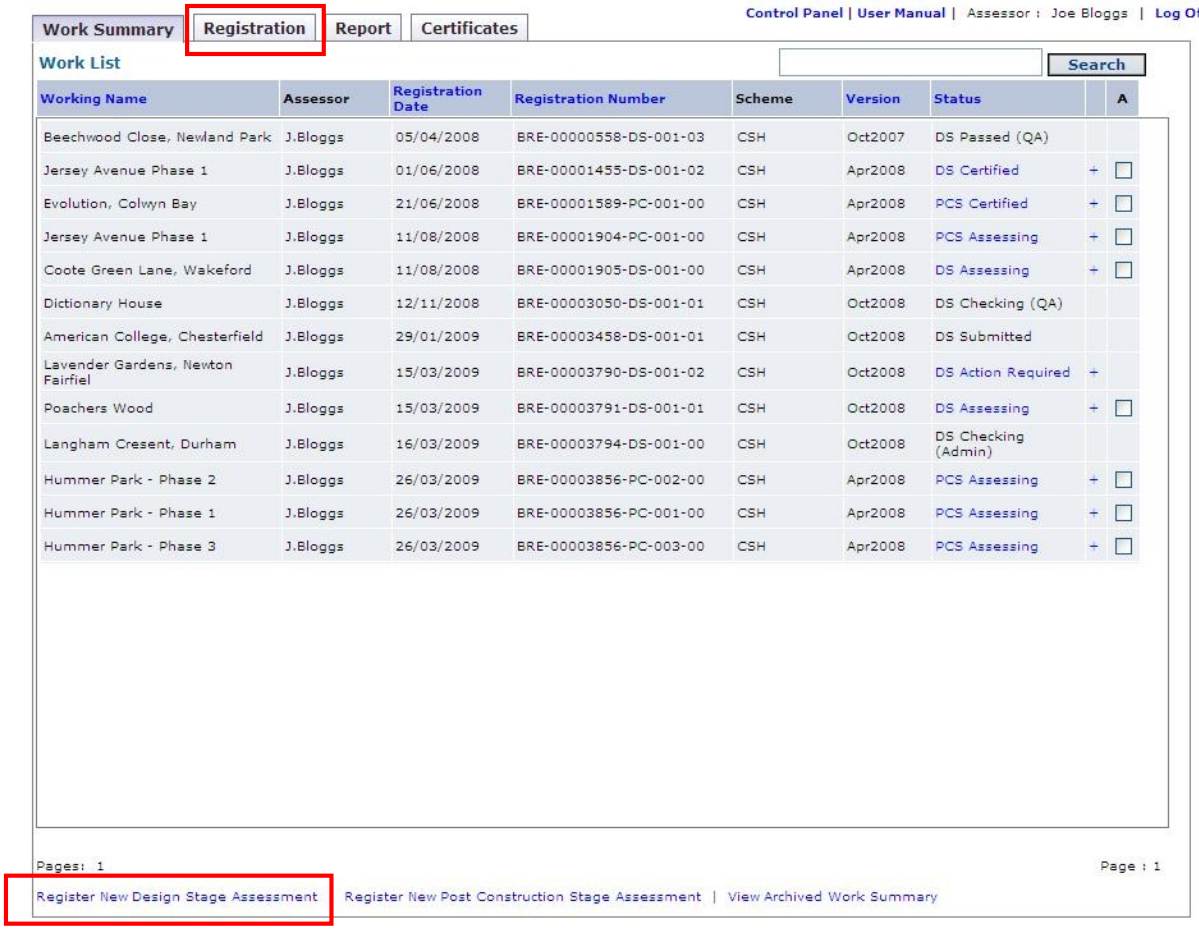
5 Registering an assessment

- Login to the system as described in Section 3 of this Manual.
- From the **Work Summary** page, click either the **Registration** tab at the top of the page (For entering DS registrations only) or click on the **Register New Design Stage Assessment** (or **Post Construction Stage Assessment** – if applicable) link at the bottom of the assessment list.

Please Note ! The registration process described in this section details a **Design Stage Assessment** (**DS**). The process for registering a **Post Construction Stage Assessment** (**PCS**) is broadly similar.


Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing
Dictionary House J.Bloggs 12/11/2008 BRE-00003050-DS-001-01 CSH Oct2008 DS Checking (QA)
American College, Chesterfield J.Bloggs 29/01/2009 BRE-00003458-DS-001-01 CSH Oct2008 DS Submitted
Lavender Gardens, Newton Fairfiel J.Bloggs 15/03/2009 BRE-00003790-DS-001-02 CSH Oct2008 DS Action Required
Poachers Wood J.Bloggs 15/03/2009 BRE-00003791-DS-001-01 CSH Oct2008 DS Assessing
Langham Cresent, Durham J.Bloggs 16/03/2009 BRE-00003794-DS-001-00 CSH Oct2008 DS Checking (Admin)
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Hummer Park - Phase 1 J.Bloggs 26/03/2009 BRE-00003856-PC-001-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 3 J.Bloggs 26/03/2009 BRE-00003856-PC-003-00 CSH Apr2008 PCS Assessing
Pages: 1
Page : 1
Register New Design Stage Assessment
Register New Post Construction Stage Assessment | View Archived Work Summary

- The **DS Registration** page is displayed.

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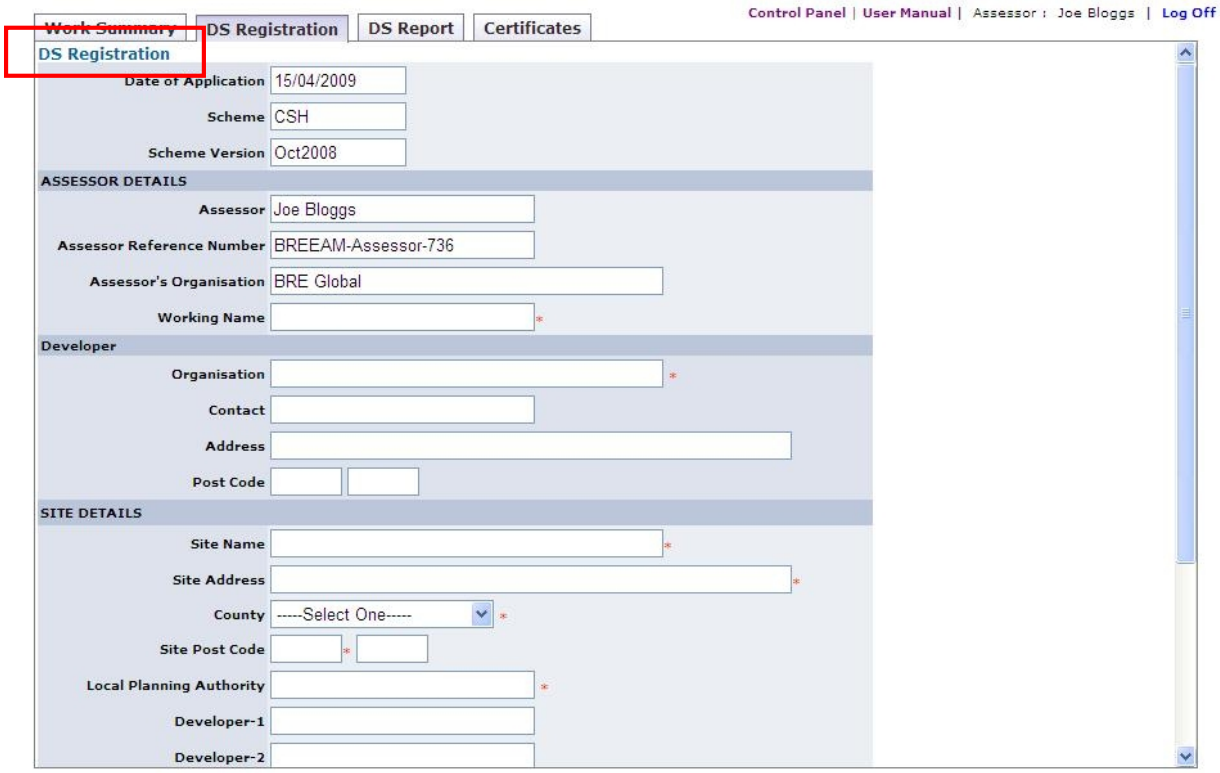
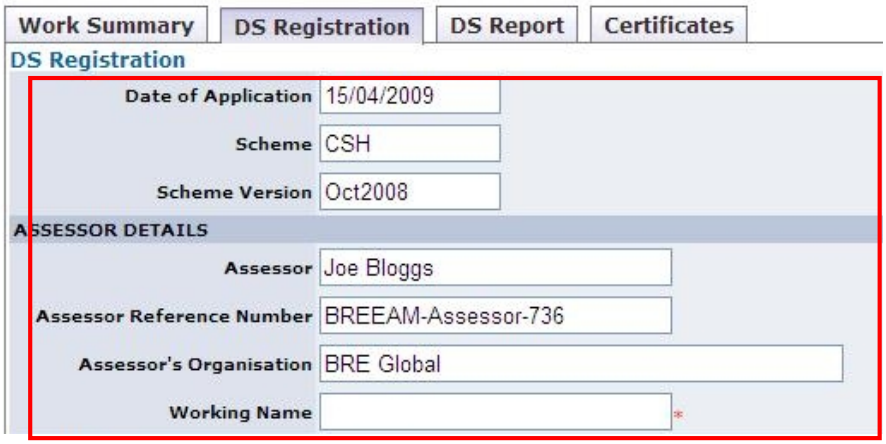


- The **Date, Scheme, Scheme Version, Assessor Name, Assessor Reference Number** and Assessor **Organisation** fields are populated automatically.



- Complete all appropriate fields on the form.
- **Please Note !** the following fields are mandatory (and are indicated with a red asterix) and must be completed before the assessment can be registered;
    - Working Name. (This field is used to help the assessor identify the development. This can be the same as site name)
    - Site Name
    - Site Address
    - County
    - Postcode (Outer)
    - Local Planning Authority
    - Developer – 1
    - Number of Units

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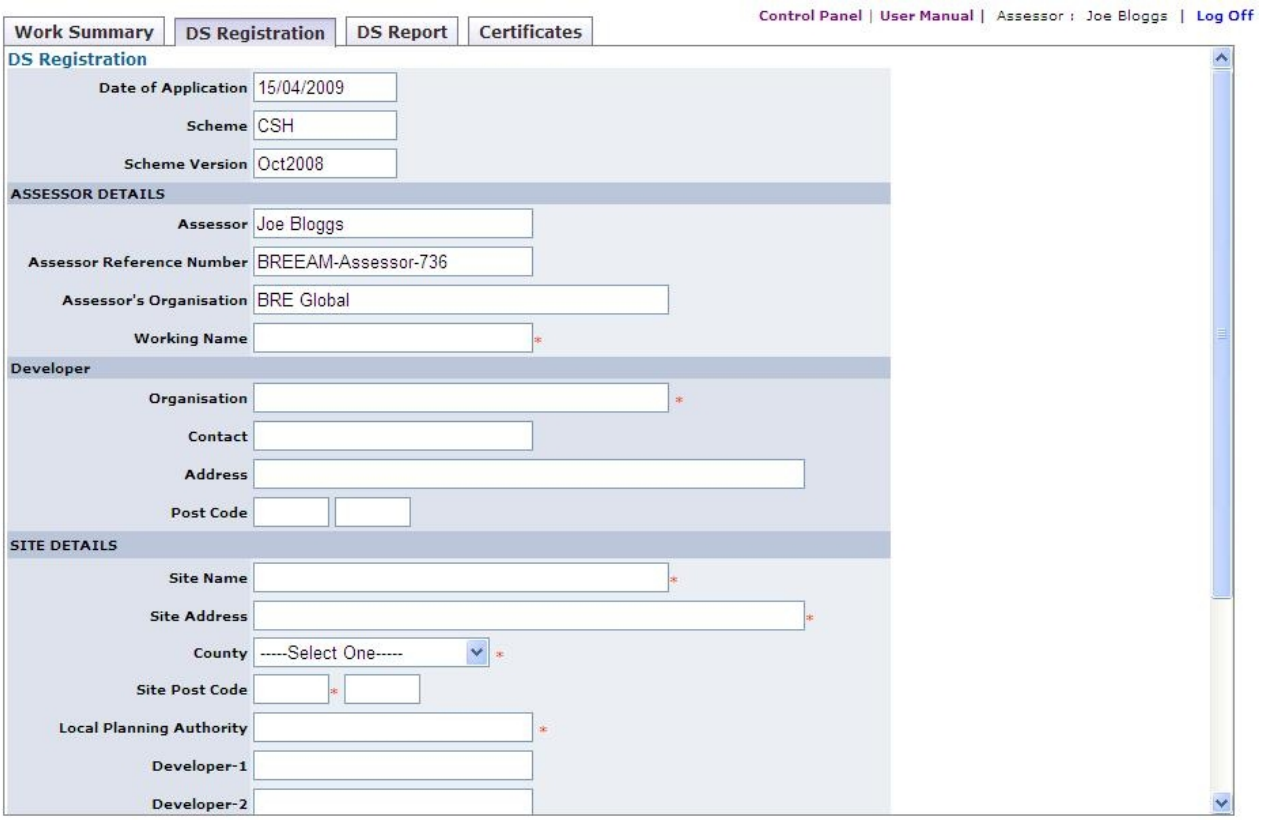

- Once all details are entered, tick the **Registration Complete** tick box and click the **Save** button in order to register the assessment.

- The registration is saved and the **Work Summary** page is displayed.

Please Note ! Although the registration is now locked, most of the registration details entered are editable within the **Assessment Details** page of the corresponding report. Where details cannot be edited, please email breeam@bre.co.uk with the report reference, field name and amendment. The **Assessment Details** form for each report can be reached by clicking on the **DS Assessing** status text, from the users work summary screen.

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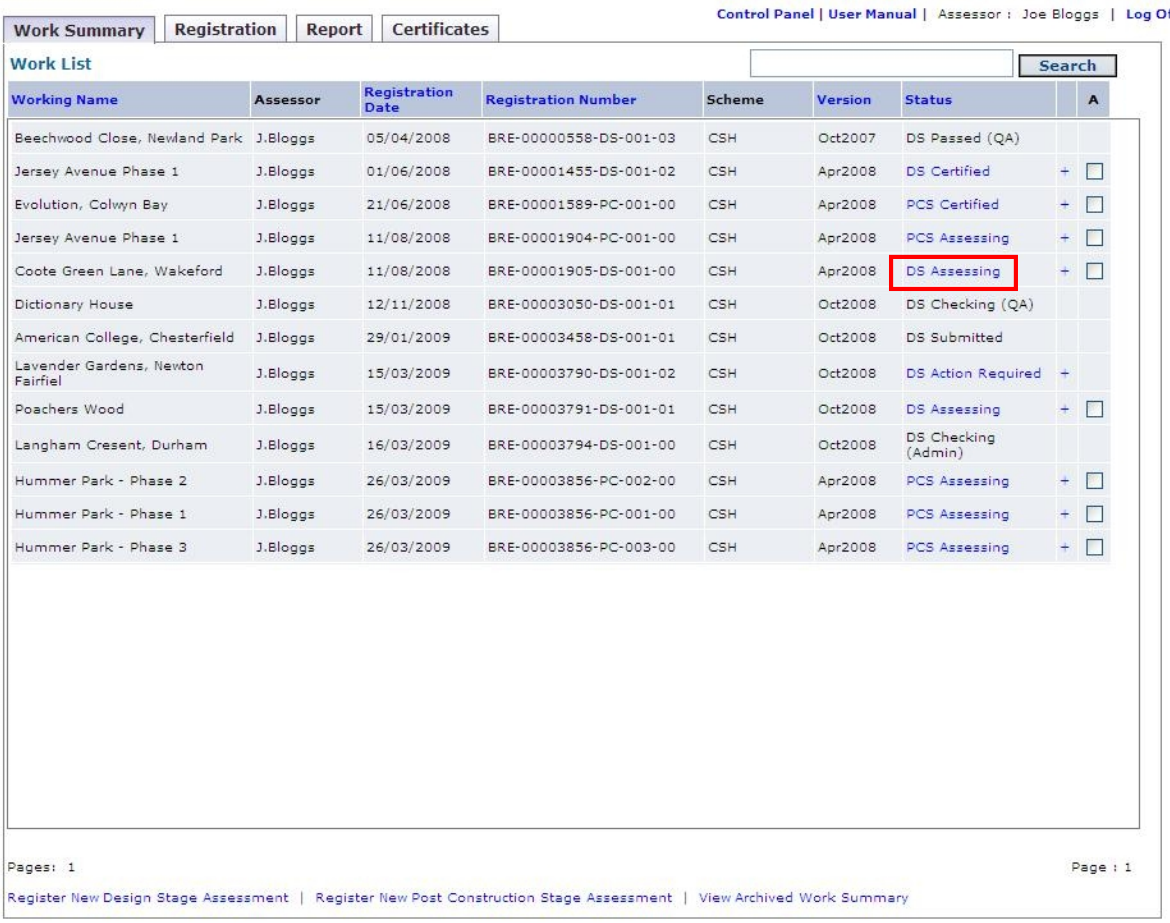

Control Panel | User Manual | Assessor : Joe Bloggs | Log Off

Work Summary | Registration | Report | Certificates

Work List

Search

Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Status		A
Beechwood Close, Newland Park	J.Bloggs	05/04/2008	BRE-00000558-DS-001-03	CSH	Oct2007	DS Passed (QA)		
Jersey Avenue Phase 1	J.Bloggs	01/06/2008	BRE-00001455-DS-001-02	CSH	Apr2008	DS Certified	+	☐
Evolution, Colwyn Bay	J.Bloggs	21/06/2008	BRE-00001589-PC-001-00	CSH	Apr2008	PCS Certified	+	☐
Jersey Avenue Phase 1	J.Bloggs	11/08/2008	BRE-00001904-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Coote Green Lane, Wakeford	J.Bloggs	11/08/2008	BRE-00001905-DS-001-00	CSH	Apr2008	DS Assessing	+	☐
Dictionary House	J.Bloggs	12/11/2008	BRE-00003050-DS-001-01	CSH	Oct2008	DS Checking (QA)		
American College, Chesterfield	J.Bloggs	29/01/2009	BRE-00003458-DS-001-01	CSH	Oct2008	DS Submitted		
Lavender Gardens, Newton Fairfiel	J.Bloggs	15/03/2009	BRE-00003790-DS-001-02	CSH	Oct2008	DS Action Required	+	
Poachers Wood	J.Bloggs	15/03/2009	BRE-00003791-DS-001-01	CSH	Oct2008	DS Assessing	+	☐
Langham Cresent, Durham	J.Bloggs	16/03/2009	BRE-00003794-DS-001-00	CSH	Oct2008	DS Checking (Admin)		
Hummer Park - Phase 2	J.Bloggs	26/03/2009	BRE-00003856-PC-002-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 1	J.Bloggs	26/03/2009	BRE-00003856-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 3	J.Bloggs	26/03/2009	BRE-00003856-PC-003-00	CSH	Apr2008	PCS Assessing	+	☐

Pages: 1 Page : 1

Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

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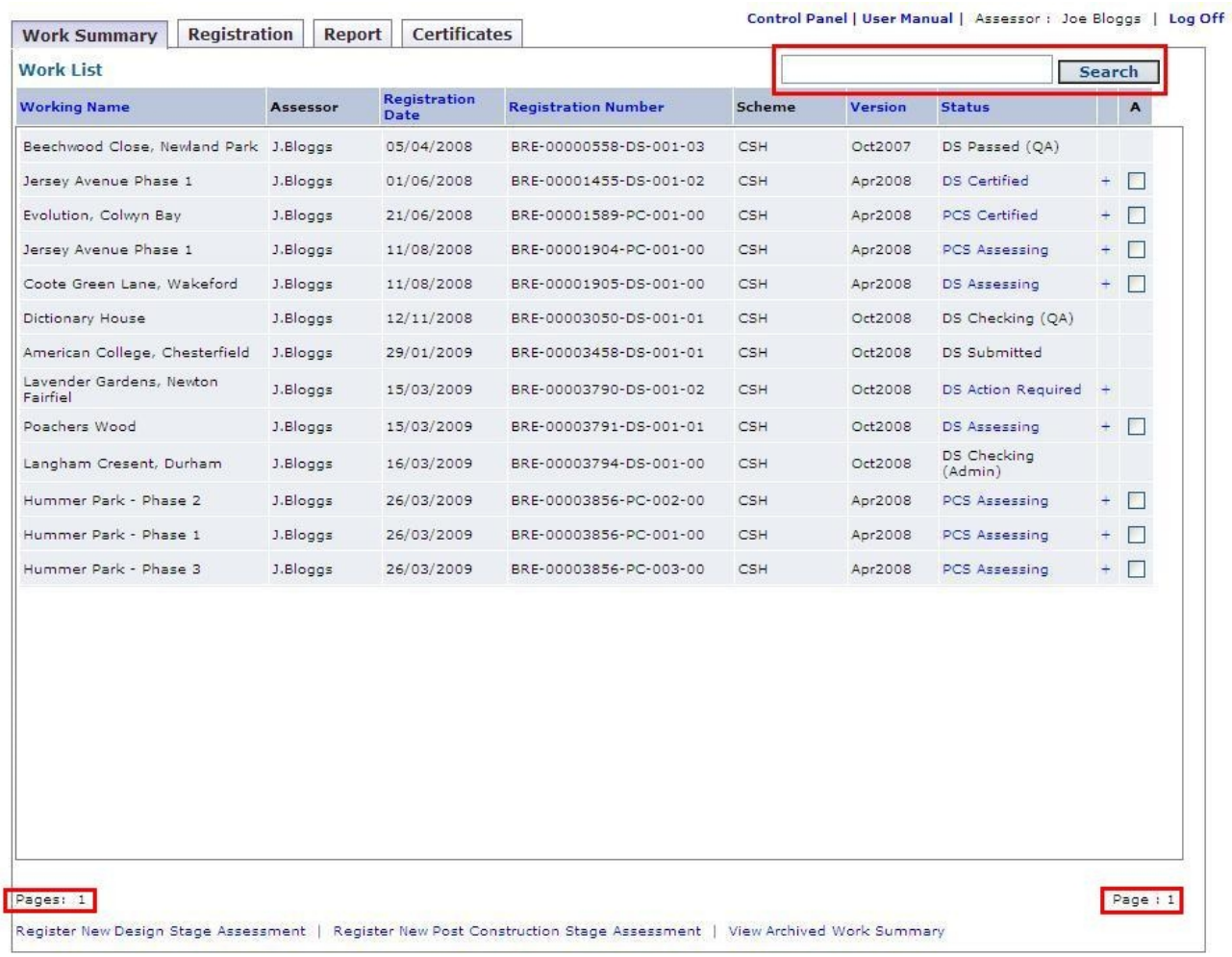
6 Search Functionality

- A search box is located on the Work Summary screen to allow easy location of specific assessments. It searches through the contents of all pages within the Work Summary.
- In order to locate an assessment it is possible to search by a partial or whole Working Name or Registration Number. Once the search term (e.g. 0558 or Beechwood) has been typed into the text box on the top right and “Search” has been clicked, any assessment with that term anywhere within the Working Name or Registration Number will be listed on the Work Summary screen.
- Page Numbers have also been added to the Work Summary screen in place of a scrolling list. A selectable list of all pages in the Work Summary will appear on the bottom left of the screen. The currently selected page will appear on the bottom right of the screen.


Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
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Poachers Wood J.Bloggs 15/03/2009 BRE-00003791-DS-001-01 CSH Oct2008 DS Assessing
Langham Cresent, Durham J.Bloggs 16/03/2009 BRE-00003794-DS-001-00 CSH Oct2008 DS Checking (Admin)
Hummer Park - Phase 2 J.Bloggs 26/03/2009 BRE-00003856-PC-002-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 1 J.Bloggs 26/03/2009 BRE-00003856-PC-001-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 3 J.Bloggs 26/03/2009 BRE-00003856-PC-003-00 CSH Apr2008 PCS Assessing
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

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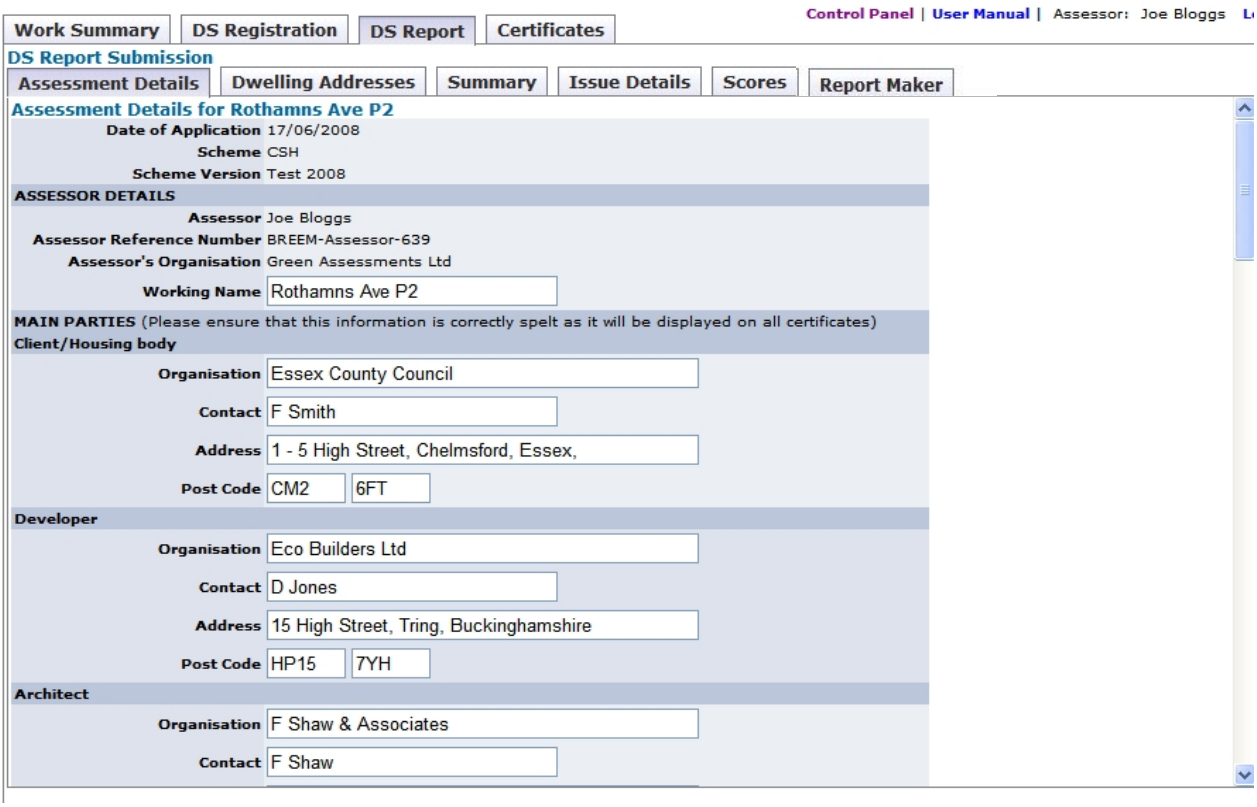
7 The assessment details tab

- By clicking on the **DS Assessing** status text following a successful registration, the user enters into the CSH report completion area of the system.
- The **Assessment Details** tab is the default tab displayed when **DS/ PCS Assessing** status is clicked
- The **Assessment Details** tab contains the Assessment Details form:



- This page has four main sections;

  1. Main Parties
  2. Site Details
  3. General Description of Site
  4. Category Summary

- When first opening the **Assessment Details** form, please enter as much data as possible.
- It will be necessary to return to this page and complete all main party and site details as the assessment progresses.
- The General Description of Site and **Category Summary** sections of this page are not mandatory for completion.

Please Note ! The information in the Assessment Details is used to populate the dwelling certificates and it is the responsibility of the assessor to ensure this information is correct.

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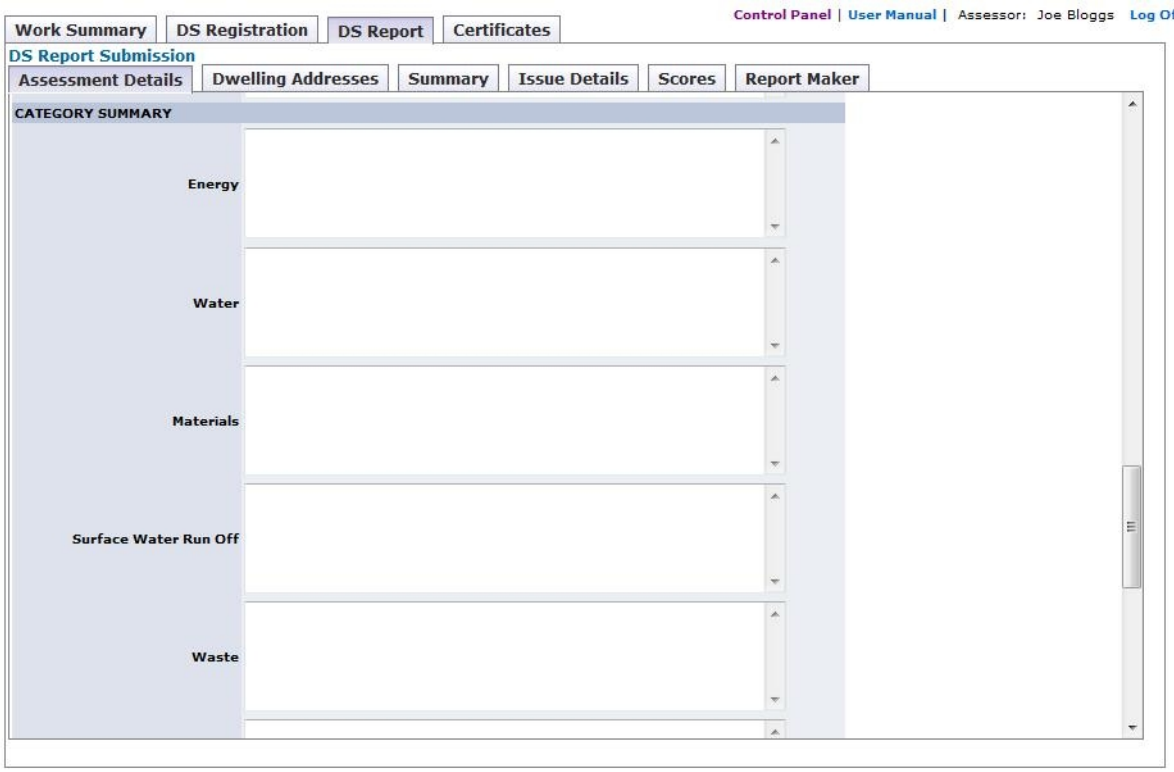
Please Note ! There is a character limit of 30 for the Organisation fields within the Client/ Housing Body, Developer and Architect sections. This is due to space for these details on the DS and PCS certificates.

Please Note ! Each free text field within the General Description of Site and Category Summary sections has a character limit of 450 characters (which includes spaces), which is 9 full lines of text. If more than 450 characters are entered, the system will not save any of the data entered into the field.

Please Note ! If the user is copying and pasting from a word processing application (such as Microsoft Word), it is strongly advised that text is copied and pasted via Notepad. This ensures that no hidden formatting is carried across, which may cause report corruption.



- When you have completed as many details as possible tick the **Update Complete** tick box and click the **Update** button.

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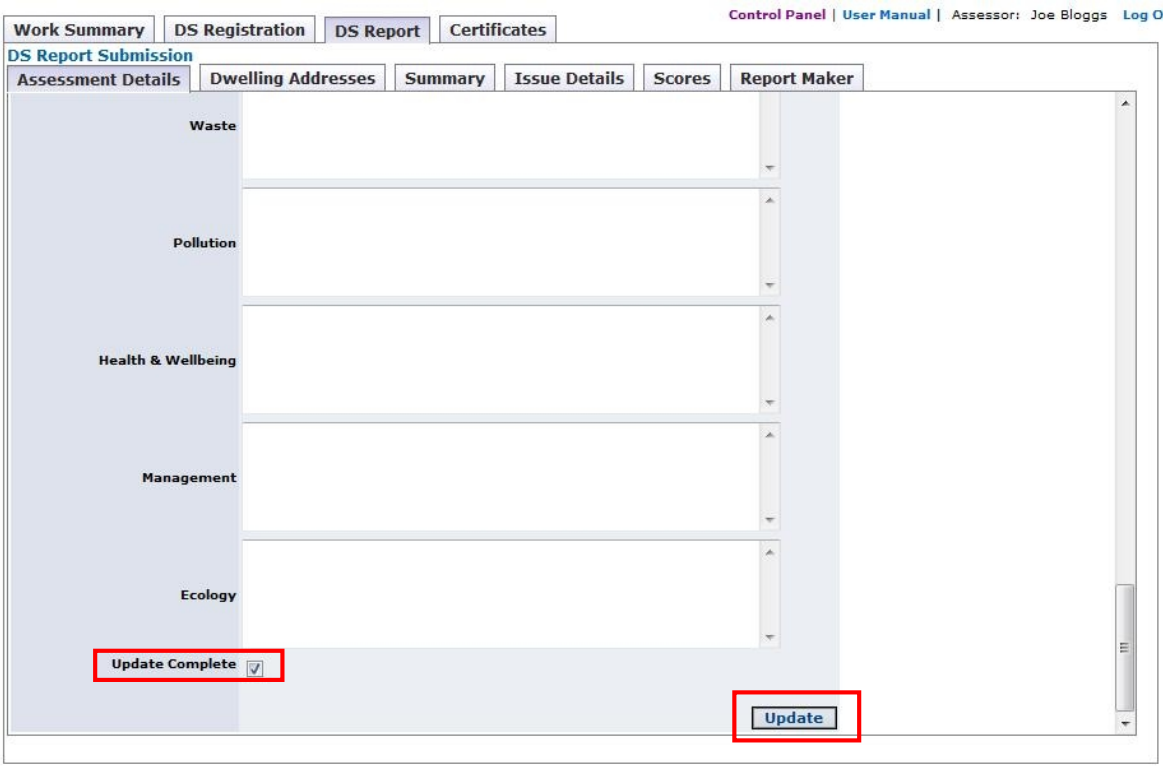

- The **Dwelling Addresses** page will then displayed.

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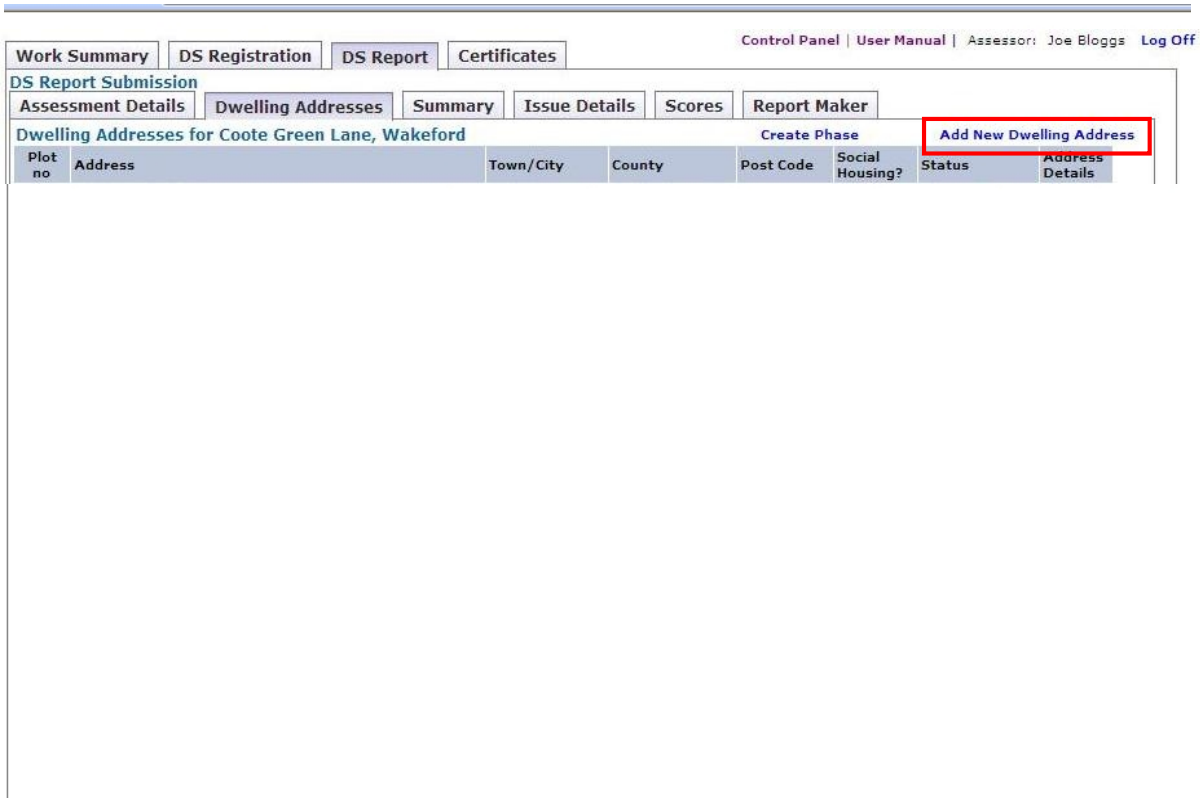
8 Creating dwelling addresses

- After an assessment is registered, the next step is likely to be the entry of dwelling addresses.

Please Note ! When amending or adding further addresses to an assessment, this page may be reached by clicking on the **Dwelling Addresses** tab.

8.1 To create a new address

- From the **Dwelling Addresses** page;
- Click on the **Add New Dwelling Address** link.



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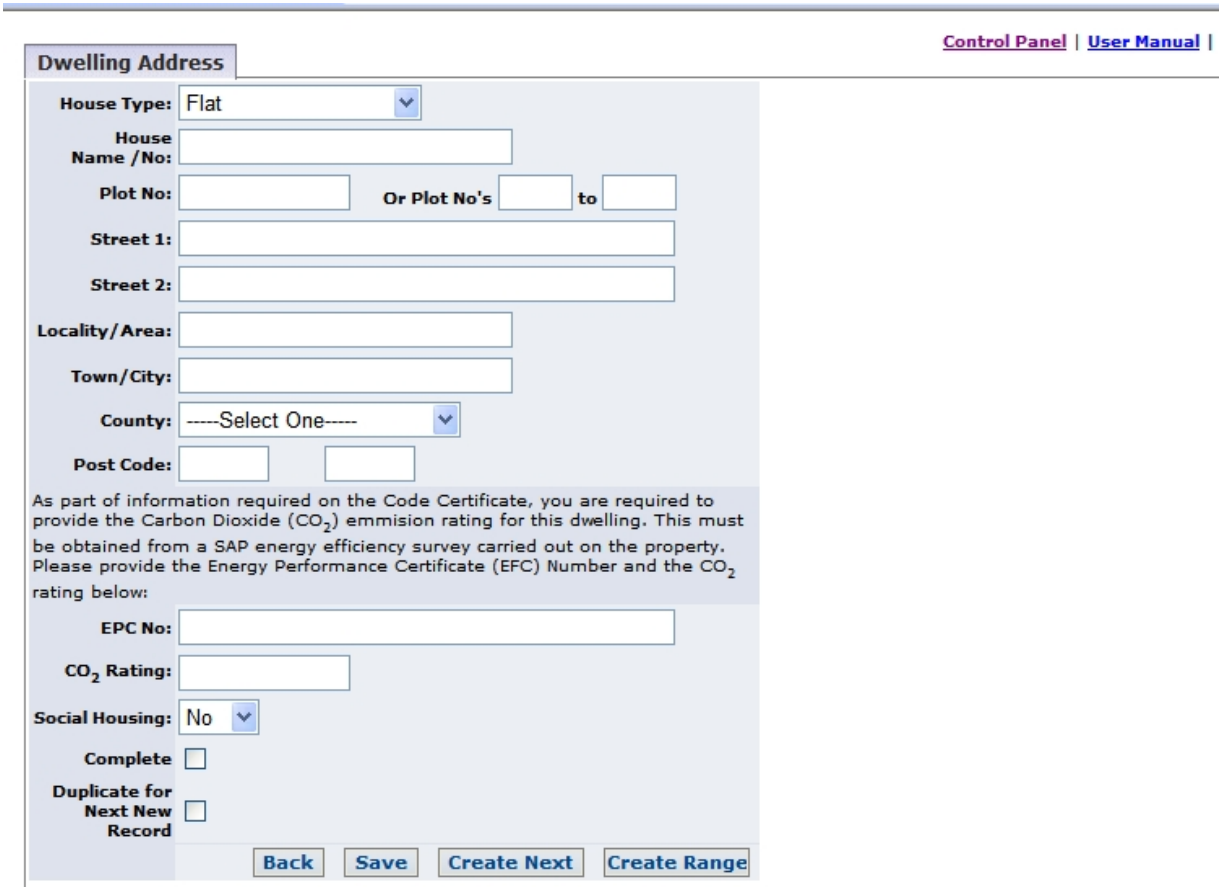
- The **Dwelling Address** details page is displayed.


Control Panel | User Manual |
Dwelling Address
House Type: Flat
House Name /No:
Plot No:
Or Plot No's
to
Street 1:
Street 2:
Locality/Area:
Town/City:
County: -----Select One-----
Post Code:
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Save
Create Next
Create Range

- With regard to dwelling addresses, each individual record can be saved as **Complete or Incomplete,** by ticking or un-ticking the **Complete** tick box before clicking on the **save/ update** button. This functionality has been included, to help assessors keep track of dwelling address records that they have only entered partial address information for. The status of each dwelling (**Complete** or **Incomplete**) is shown on the addresses summary screen.

Please Note ! The CSH system will not allow a report to be submitted unless the assessor has saved all dwelling address records as **Complete.**

- Enter as many dwelling address details as possible. The following fields are mandatory and must be completed before a dwelling address record can be saved as **Complete.**
  - House Name/No: and / or Plot no:
  - Town/City:
  - County
  - Post Code: (Outer)

- The following fields should be filled in as described below:
  - Street 1: If address details are unavailable, substitute with site street address
  - Town/City: If site is not in a town or village please enter nearest city, town or village

- If you have finished entering all available dwelling address details and do not wish to use the duplicate address details function (see below), click the **Save** button to save the address record.

Please Note! Dwelling address information entered here is used to populate certificates at the end of the process.

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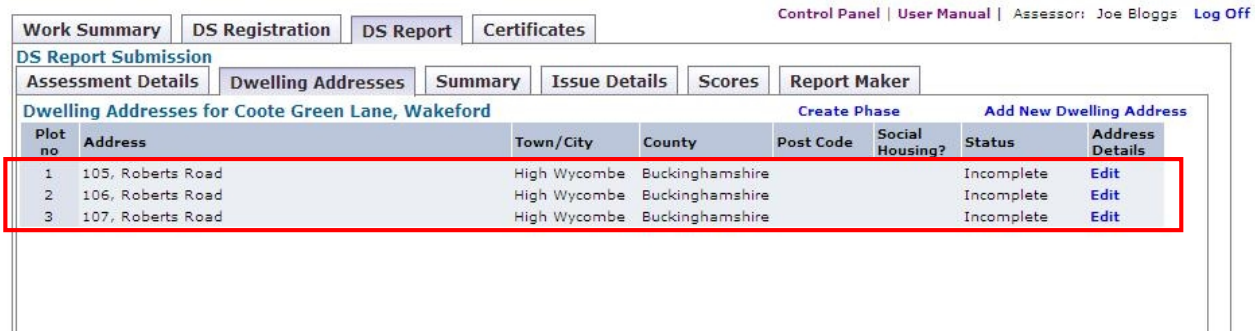
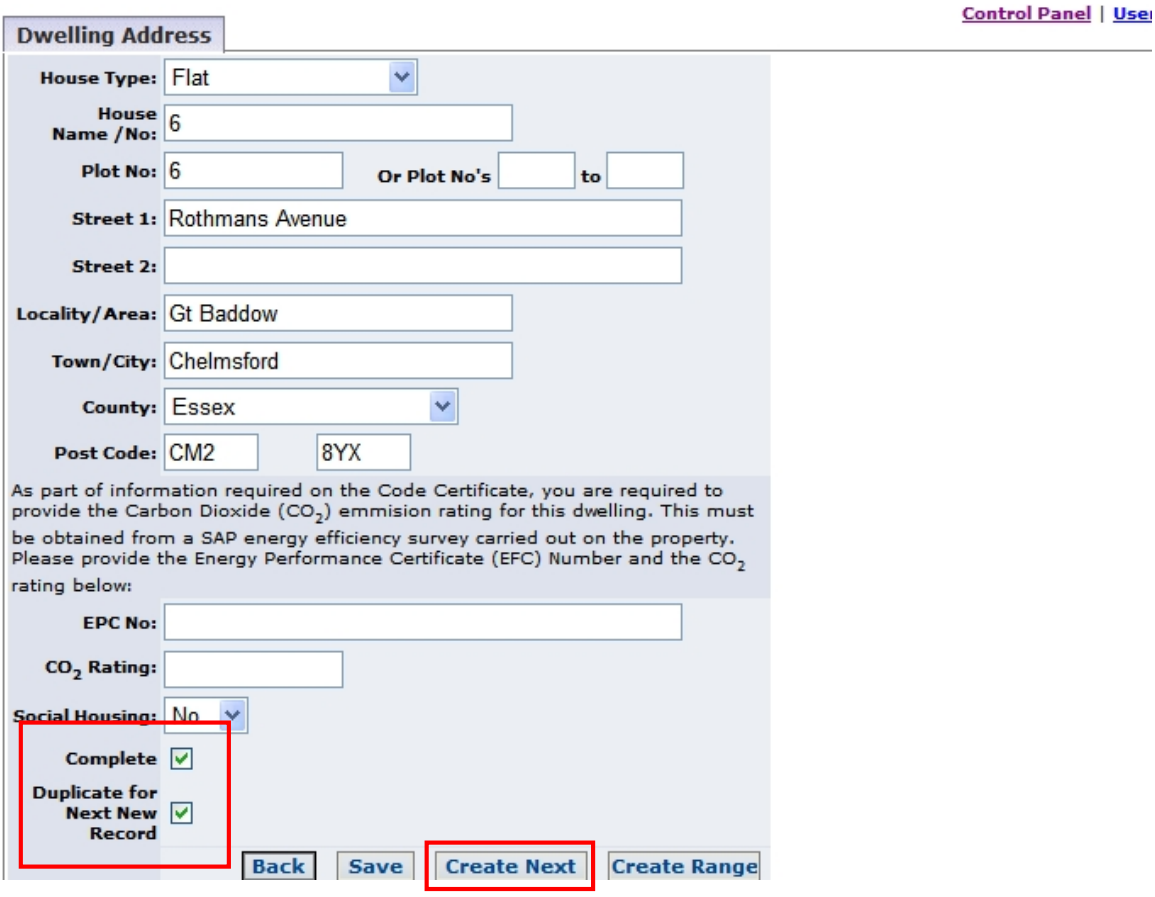
- The **Dwelling Addresses** summary page is displayed, summarising all address records for this assessment.



8.2 Duplicate address details

- It is possible to use the details you have entered for other address records which share the same details.

- If you wish to do so, whilst creating an address record tick the **Duplicate for Next New Record** tick box and click the **Create Next** button.


Control Panel | User
Dwelling Address
House Type: Flat
House Name /No: 6
Plot No: 6
Or Plot No's to
Street 1: Rothmans Avenue
Street 2:
Locality/Area: Gt Baddow
Town/City: Chelmsford
County: Essex
Post Code: CM2 8YX
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Save
Create Next
Create Range

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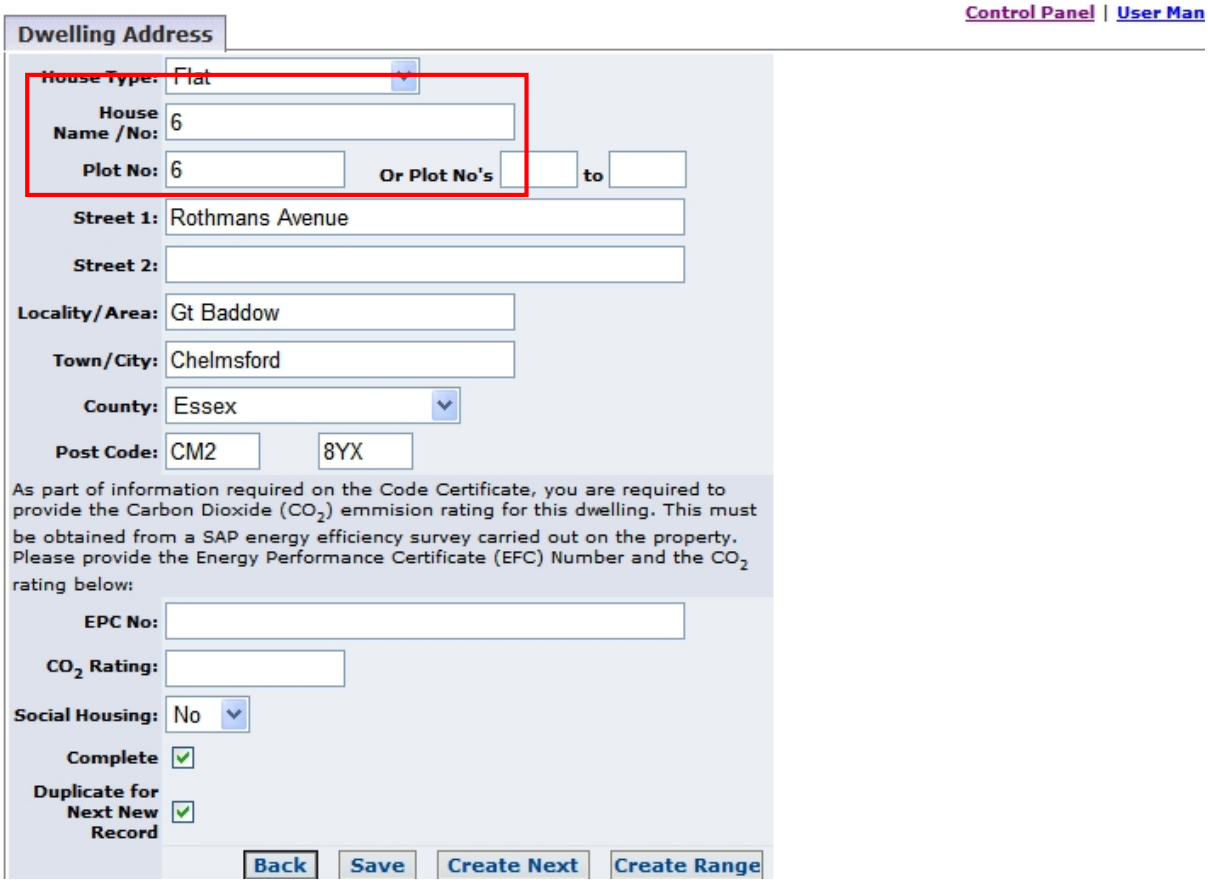
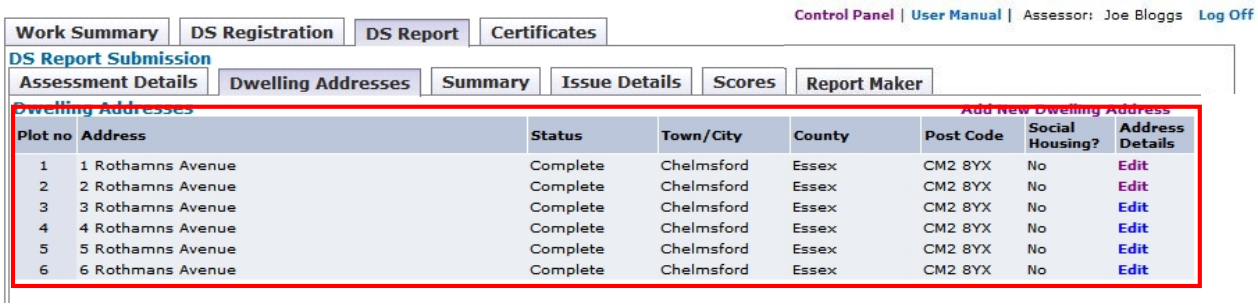
- The record you are currently creating will be saved and a new address record will be created with all fields except the **House Name/No:** and **Plot no:** fields populated. You must enter these details for each new record.


Control Panel | User Man
Dwelling Address
House Type: Flat
House Name /No: 6
Plot No: 6
Or Plot No's to
Street 1: Rothmans Avenue
Street 2:
Locality/Area: Gt Baddow
Town/City: Chelmsford
County: Essex
Post Code: CM2 8YX
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Save
Create Next
Create Range

- Once you have completed entering all address records, untick the **Duplicate for Next New Record** tick box and click the **Save** button to save the final address record.

- The **Dwelling Addresses** summary page is displayed, summarising all address records for this assessment.



Plot no	Address	Status	Town/City	County	Post Code	Social Housing?	Address Details
1	1 Rothamns Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit
2	2 Rothamns Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit
3	3 Rothamns Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit
4	4 Rothamns Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit
5	5 Rothamns Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit
6	6 Rothmans Avenue	Complete	Chelmsford	Essex	CM2 8YX	No	Edit

Please Note ! Dwelling address records can be duplicated as complete OR incomplete, by ticking or unticking the 'complete' box as appropriate, before clicking **Create Next.**

Please Note ! The EPC Number and CO_2 Rating are mandatory for PCS Assessments only. They are not required when completing DS assessments.

NB CO_2 Rating should be a whole number between 1 and 100 only (no letters)

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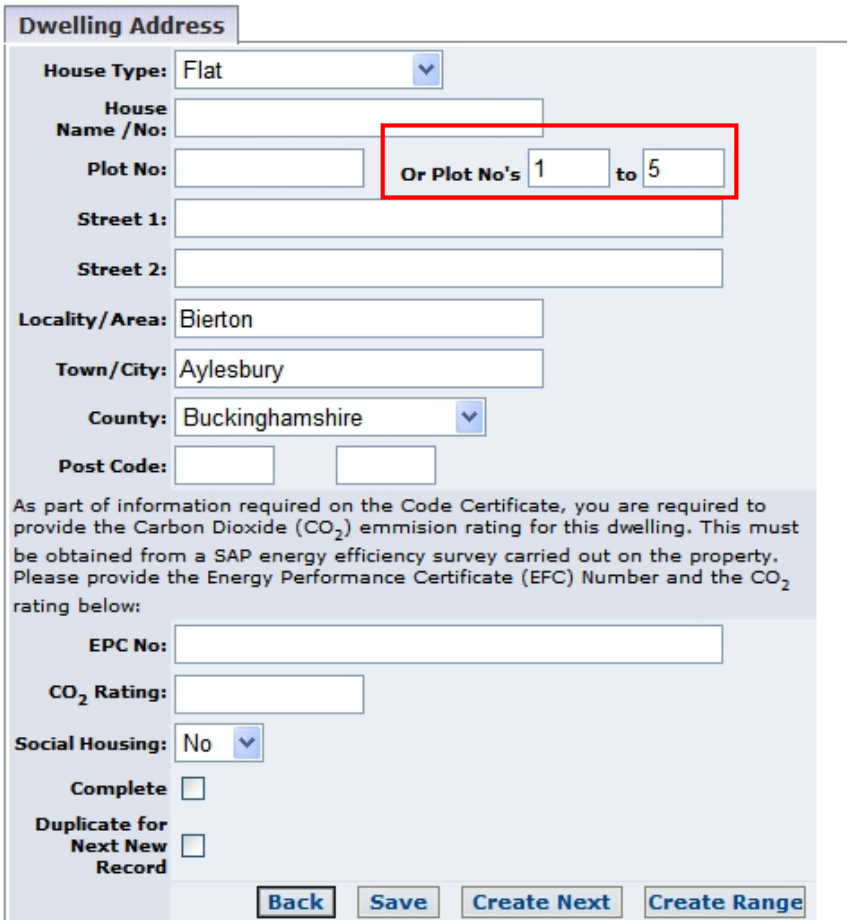
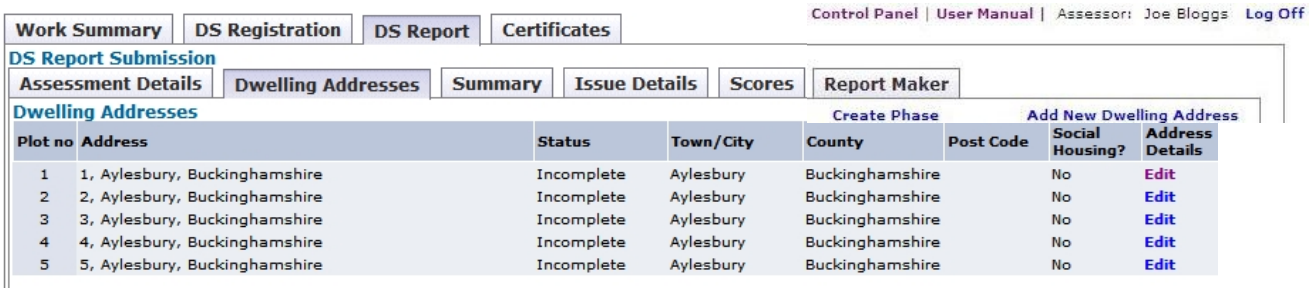
8.3 Creating a range of dwelling addresses

- Users are also able to create a range of dwelling addresses
- In order to do this, complete the "Or Plot No's" section with a range of plot numbers


Dwelling Address
House Type: Flat
House Name /No:
Plot No:
Or Plot No's 1 to 5
Street 1:
Street 2:
Locality/Area: Bierton
Town/City: Aylesbury
County: Buckinghamshire
Post Code:
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Save
Create Next
Create Range

- Other mandatory fields in order to complete a range of dwellings are:
  - Town/ City
  - County

- Once these fields are completed click on the **Create Range** button.
- Click the **Back** button to return to the dwelling address summary screen:


Control Panel | User Manual | Assessor: Joe Bloggs Log Off
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Dwelling Addresses
Create Phase
Add New Dwelling Address
Plot no | Address | Status | Town/City | County | Post Code | Social Housing? | Address Details
1 | 1, Aylesbury, Buckinghamshire | Incomplete | Aylesbury | Buckinghamshire | | No | Edit
2 | 2, Aylesbury, Buckinghamshire | Incomplete | Aylesbury | Buckinghamshire | | No | Edit
3 | 3, Aylesbury, Buckinghamshire | Incomplete | Aylesbury | Buckinghamshire | | No | Edit
4 | 4, Aylesbury, Buckinghamshire | Incomplete | Aylesbury | Buckinghamshire | | No | Edit
5 | 5, Aylesbury, Buckinghamshire | Incomplete | Aylesbury | Buckinghamshire | | No | Edit

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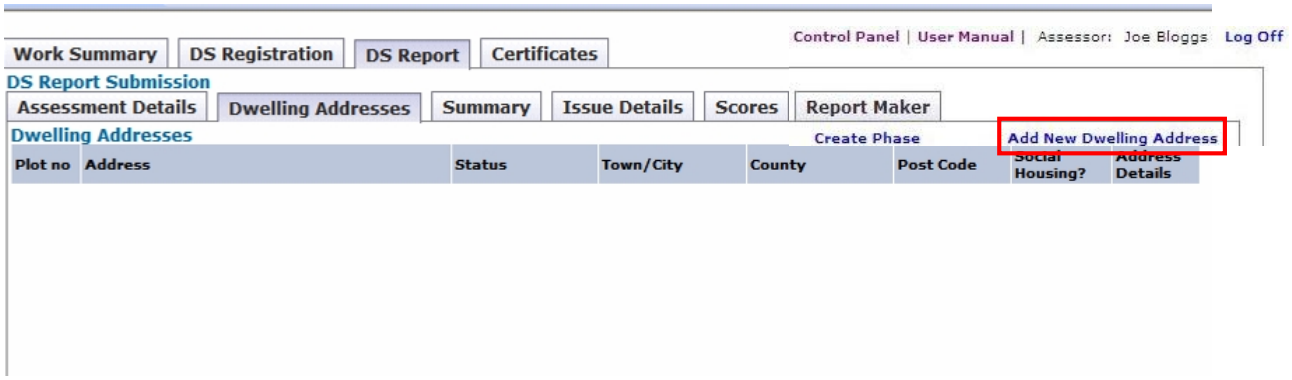
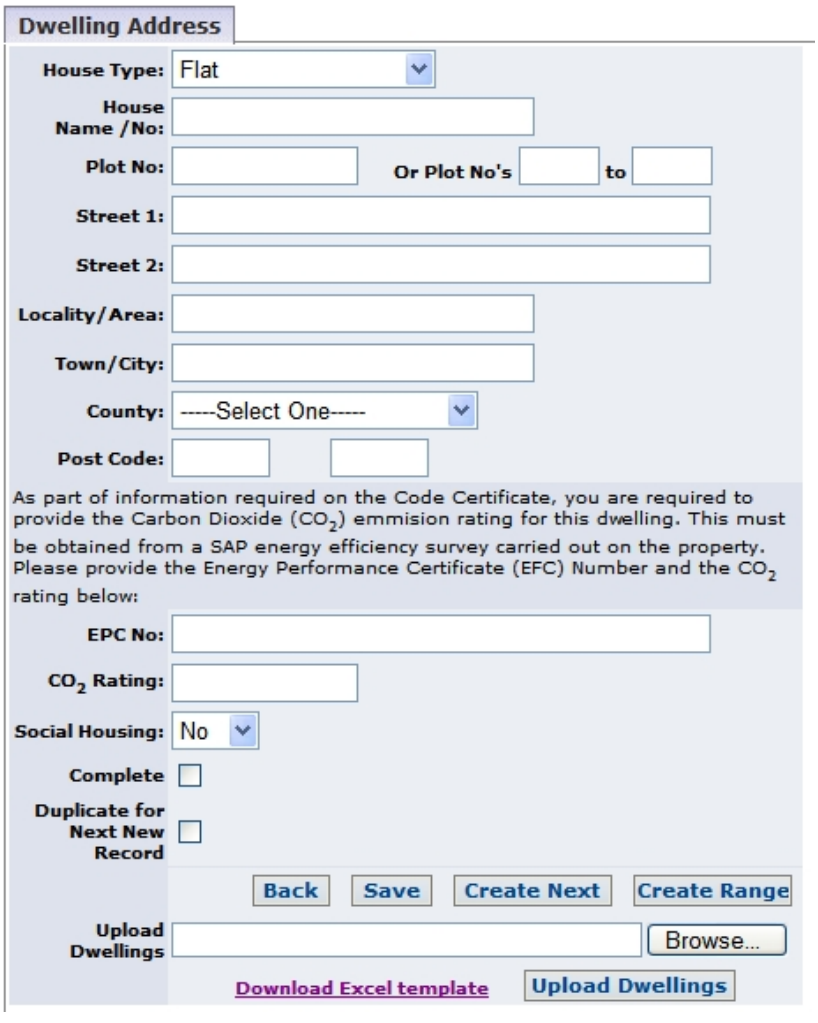
8.4 Importing dwelling addresses

- Users are able to import dwelling addresses onto the dwelling address summary screen from a Microsoft Excel template.
- From the **Dwelling addresses** page;
- Click on the **Add New Dwelling Address** link.



- The **Dwelling Address** details page is displayed.


Dwelling Address
House Type: Flat
House Name /No:
Plot No:
Or Plot No's
to
Street 1:
Street 2:
Locality/Area:
Town/City:
County: -----Select One-----
Post Code:
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Save
Create Next
Create Range
Upload Dwellings
Browse...
Download Excel template
Upload Dwellings

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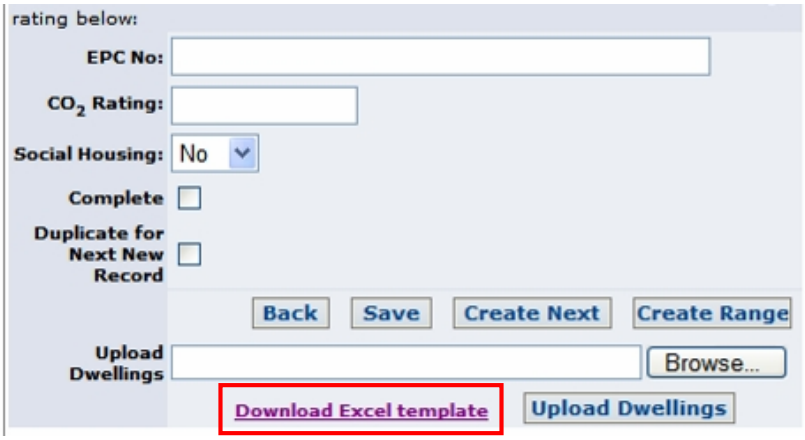
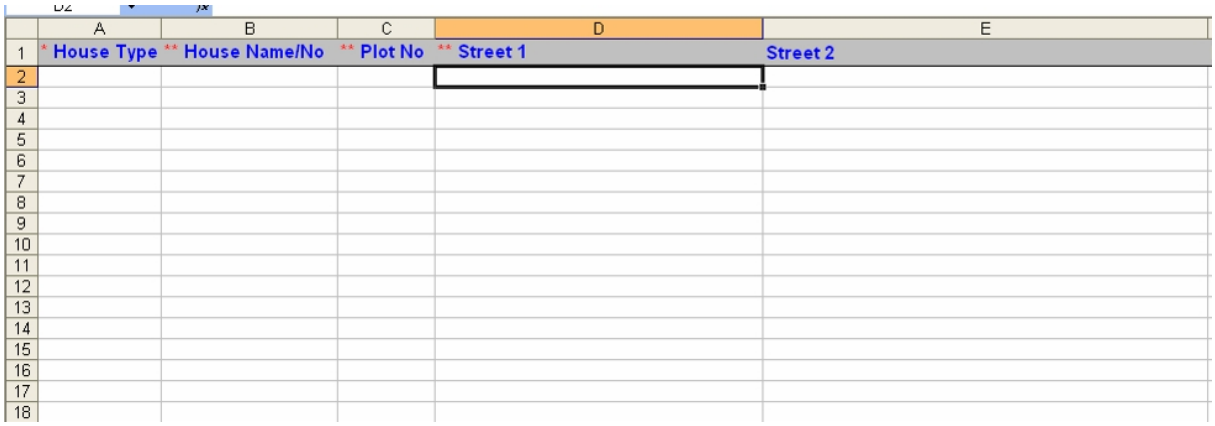
- Click on the **Download Excel template** link at the bottom of the **Dwelling Address** details page.



- The template will be displayed;



Please Note ! At the bottom of the spreadsheet there is a tab for a worksheet called **Read Me**. This provides detailed instructions on how to use the spreadsheet.

- When all dwelling address details to be imported have been entered onto the template, please save it.

	A	B	C	D	E	F	G	H
1	* House Type	** House Name/No	** Plot No	** Street 1	Street 2	Locality/Area	* Town/City	* County
11	House	105	1	Roberts Road			High Wycombe	Buckinghamshire
12	House	106	2	Roberts Road			High Wycombe	Buckinghamshire
13	House	107	3	Roberts Road			High Wycombe	Buckinghamshire
14								
15								
16								
17								

- Click on the **Browse** link at the bottom of the **Dwelling Address** details page.

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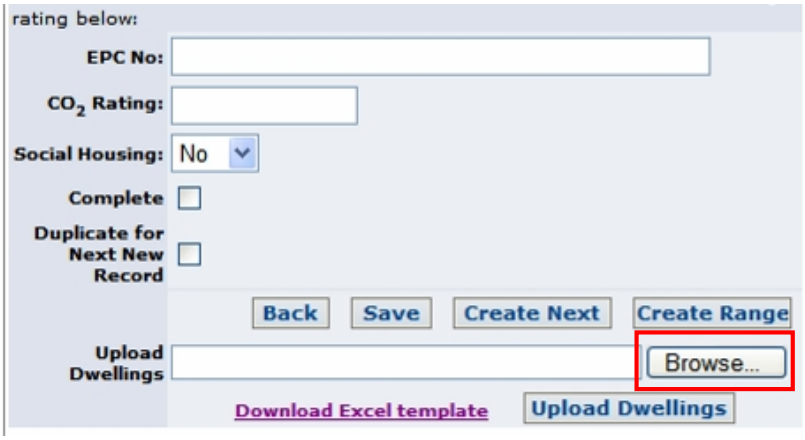
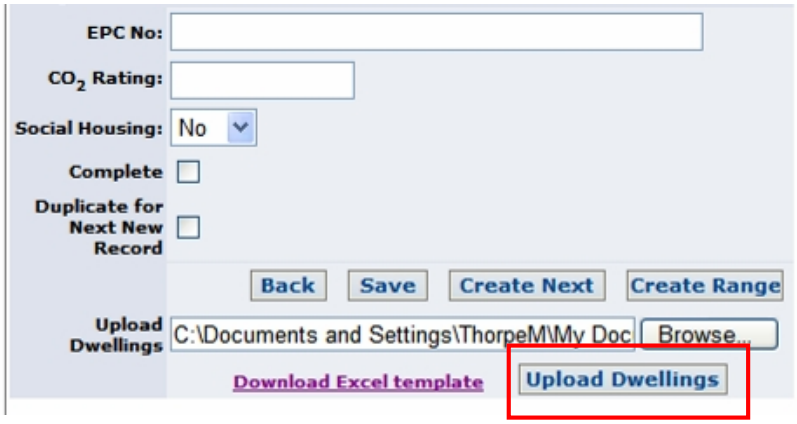
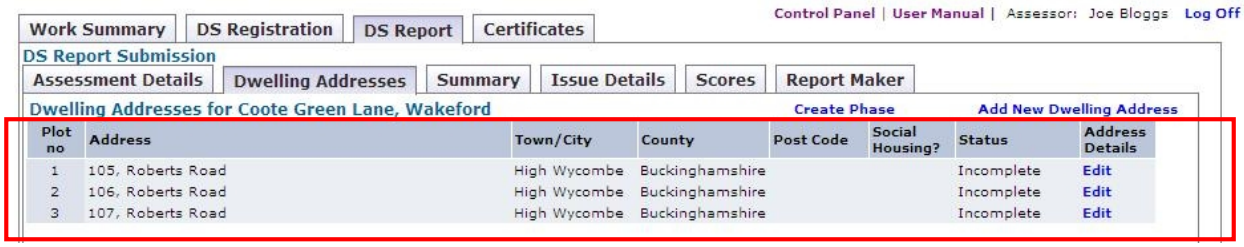


- Select the file that has been saved, and click on **Upload Dwellings.**



- The dwelling address details entered will be displayed on the **Dwelling Address** summary screen;



Please Note ! Dwelling address records can only be imported as **INCOMPLETE** using the import dwelling address functionality. All dwelling address records will have to be edited and marked as **COMPLETE** manually, before the report can be submitted.

Please Note ! ONLY the supplied template available on the CSH system should be used to import dwelling address records onto the CSH system.

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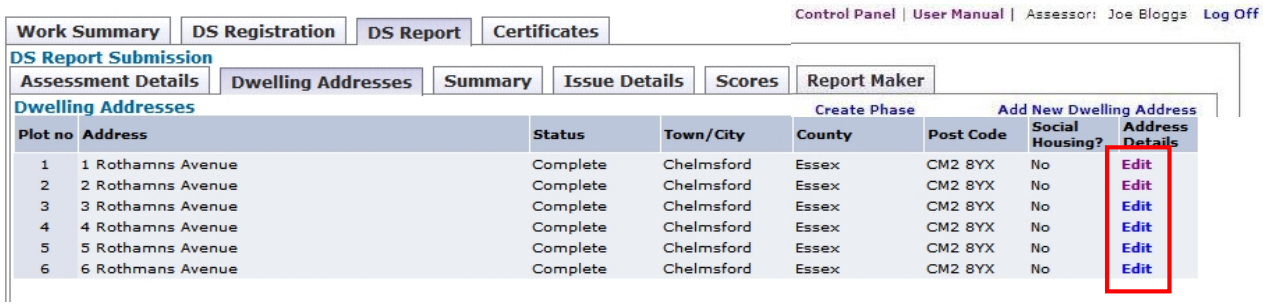
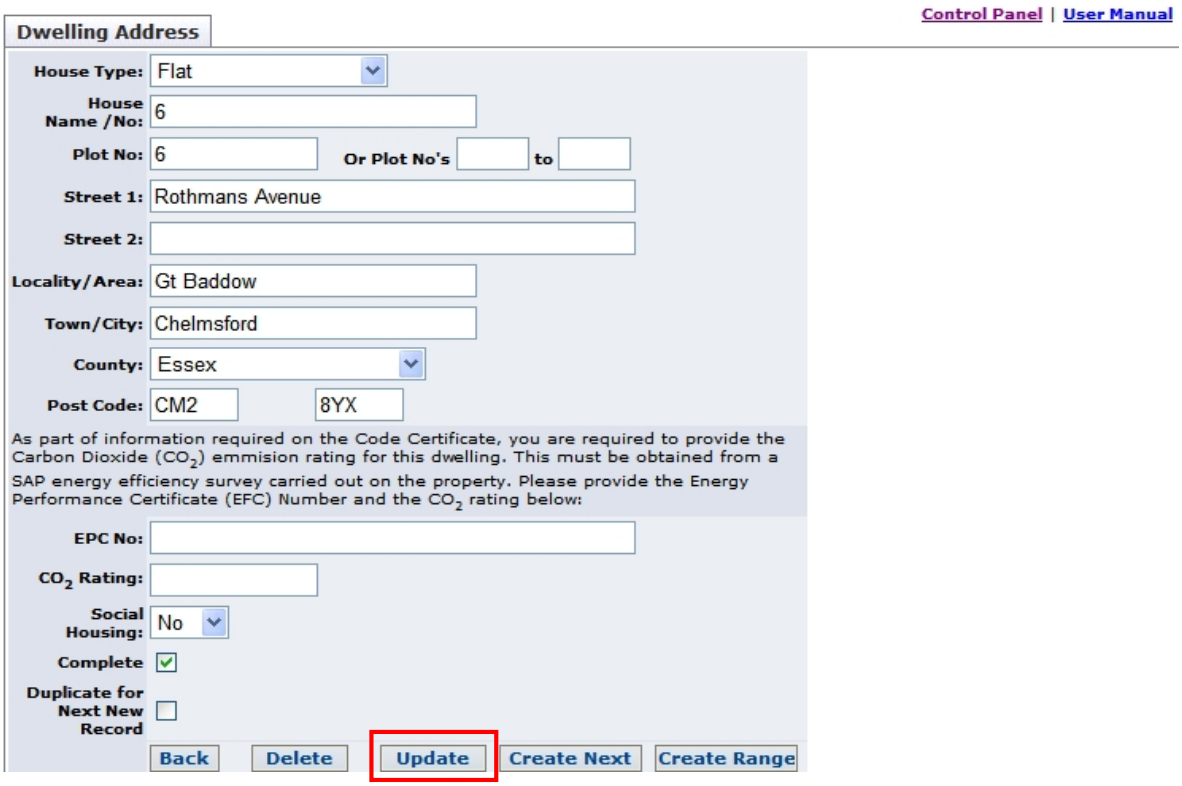
8.5 Amend an address

- From the **Dwelling Addresses** summary page, click on the **Edit** button in the right hand column of the appropriate address record.


Control Panel | User Manual | Assessor: Joe Bloggs Log Off
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Dwelling Addresses
Create Phase
Add New Dwelling Address
Plot no | Address | Status | Town/City | County | Post Code | Social Housing? | Address Details
1 | 1 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
2 | 2 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
3 | 3 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
4 | 4 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
5 | 5 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
6 | 6 Rothmans Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit

- The **Dwelling Addresses** details page is displayed. Amend the details of the dwelling address record as required.
- Once amendments for this address record are completed, click on the **Update** button to save the changes.


Control Panel | User Manual
Dwelling Address
House Type: Flat
House Name /No: 6
Plot No: 6
Or Plot No's
to
Street 1: Rothmans Avenue
Street 2:
Locality/Area: Gt Baddow
Town/City: Chelmsford
County: Essex
Post Code: CM2 8YX
As part of information required on the Code Certificate, you are required to provide the Carbon Dioxide (CO_2) emmision rating for this dwelling. This must be obtained from a SAP energy efficiency survey carried out on the property. Please provide the Energy Performance Certificate (EFC) Number and the CO_2 rating below:
EPC No:
CO_2 Rating:
Social Housing: No
Complete
Duplicate for Next New Record
Back
Delete
Update
Create Next
Create Range

Please Note ! The report cannot be submitted until all dwelling address records show a status of **Complete**.

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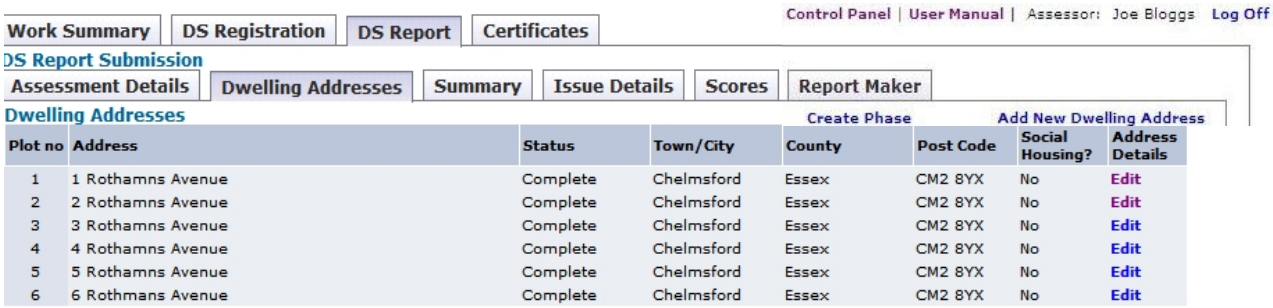
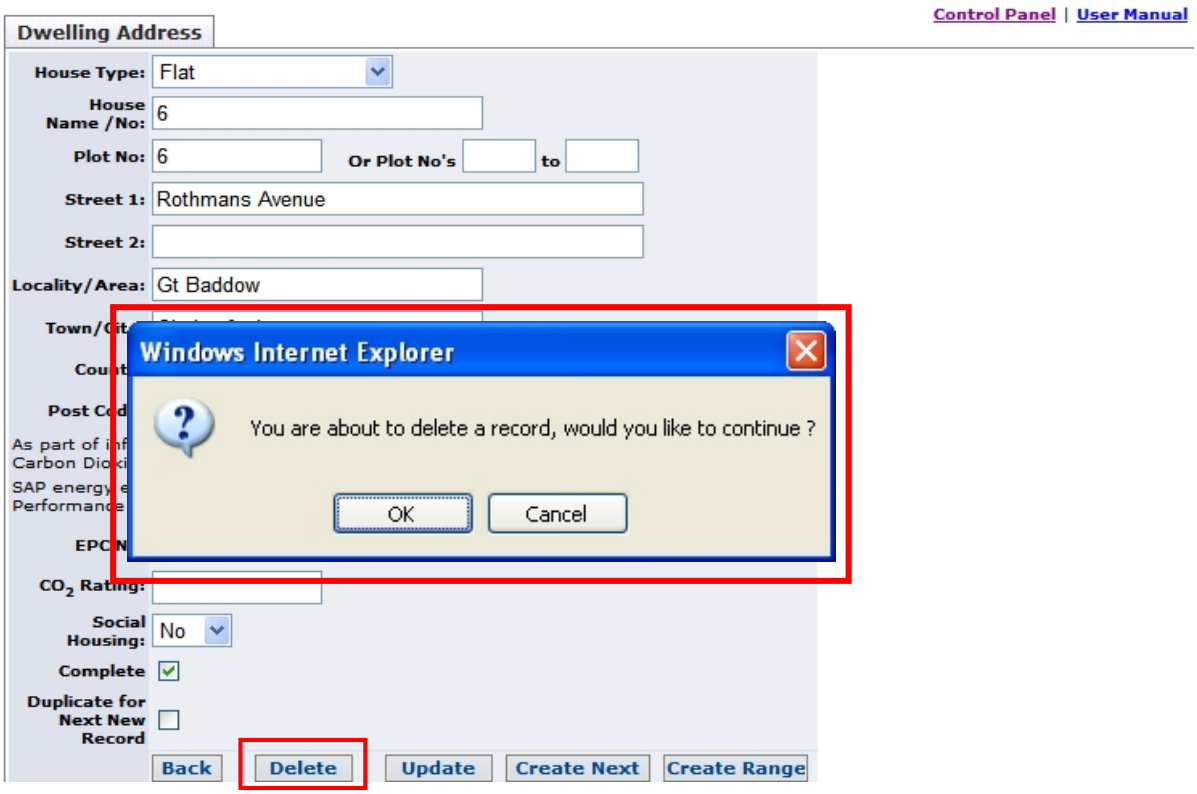
- The **Dwelling Addresses** summary page is displayed, summarising all dwelling address records for this assessment.


Control Panel | User Manual | Assessor: Joe Bloggs Log Off
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Dwelling Addresses
Create Phase
Add New Dwelling Address
Plot no | Address | Status | Town/City | County | Post Code | Social Housing? | Address Details
1 | 1 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
2 | 2 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
3 | 3 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
4 | 4 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
5 | 5 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
6 | 6 Rothmans Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit

8.6 Delete an address

- From the **Dwelling Addresses** summary page, click on the **Edit** button in the right hand column of the appropriate address record.
- Please ensure that this is the dwelling address record you wish to delete. If you are sure this address needs to be deleted, click the **Delete** button



- The **Dwelling Addresses** summary page is displayed, summarising all address records for this assessment.

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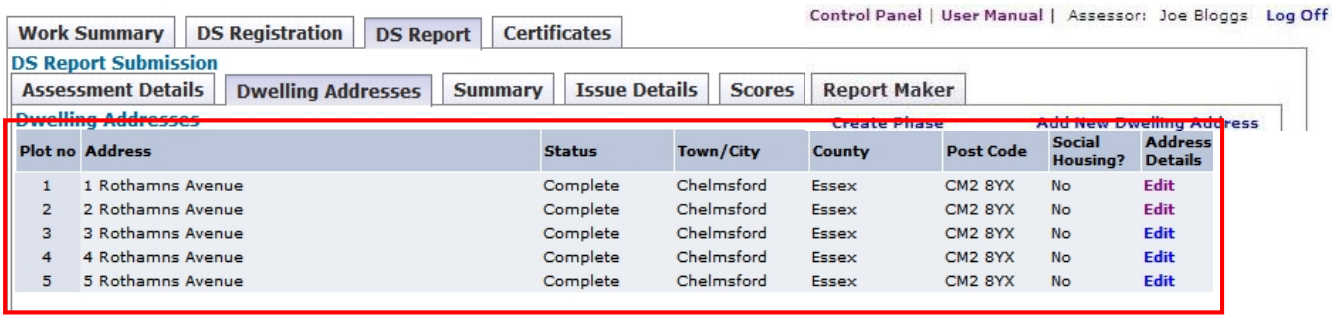
Control Panel | User Manual | Assessor: Joe Bloggs Log Off
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Dwelling Addresses
Create Phase
Add New Dwelling Address
Plot no | Address | Status | Town/City | County | Post Code | Social Housing? | Address Details
1 | 1 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
2 | 2 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
3 | 3 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
4 | 4 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit
5 | 5 Rothamns Avenue | Complete | Chelmsford | Essex | CM2 8YX | No | Edit

Please Note ! If you have previously allocated spec ID's to a dwelling, and you wished to delete that dwelling address, then you must first unallocated all the spec ID's assigned to that dwelling before proceeding with the delete.

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9 Entering assessment details

- Once the assessment is registered and the summary details are entered the next stage will be to describe and assess the range of specifications applicable for each dwelling against each of the 34 Code issues. As specifications are added against each issue, the system awards them an ID number, hence they are referred to as Specification ID's, or "Spec ID's" for short.

- In the context of the Code for Sustainable Homes, a Spec ID can be defined as:

  "A way of describing how credits have been achieved for a particular issue."

- As an example, for Ene 1 a spec ID might be called – "House type A". This would be in relation to SAP assessments.

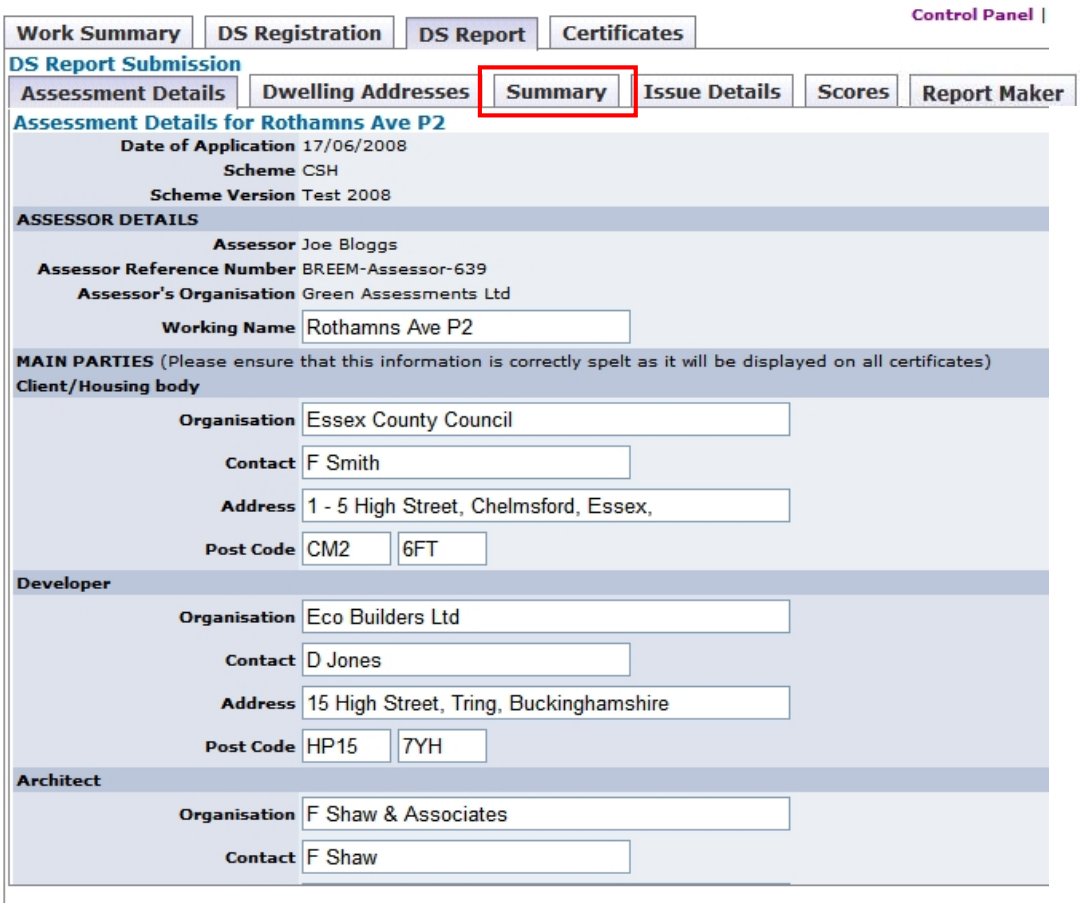
  For Ene 4, a spec ID might be called "10 metre washing line".

- As a spec Id can be defined through the way in which credits are achieved, it could be applicable to one or more (possibly all) of the dwellings being assessed on the site. This should help to prevent duplication of information, and aid the assessor when the PCS assessment is undertaken.

- From the **Work Summary** page, click on the **DS Assessing** Status text for the assessment you wish to update.

- The **Assessment Details** page is displayed.

- Click on the **Summary** tab



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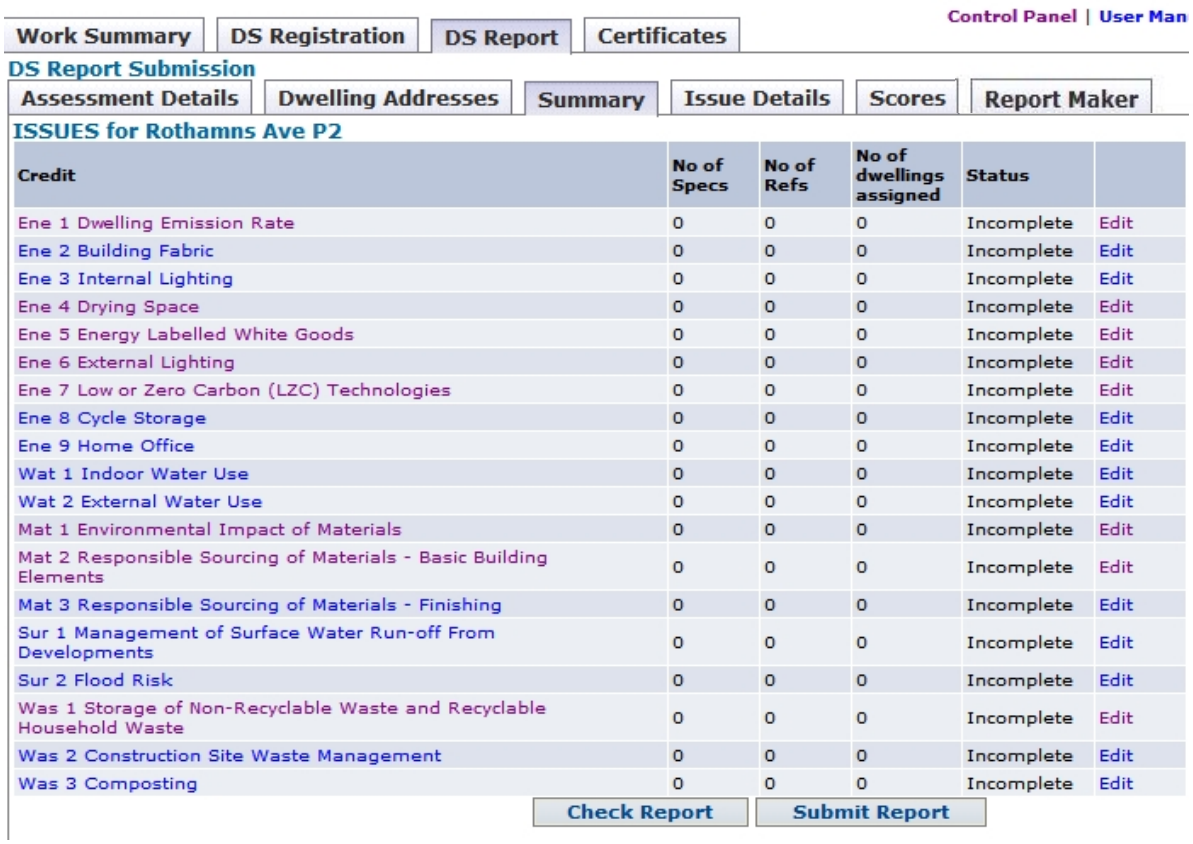
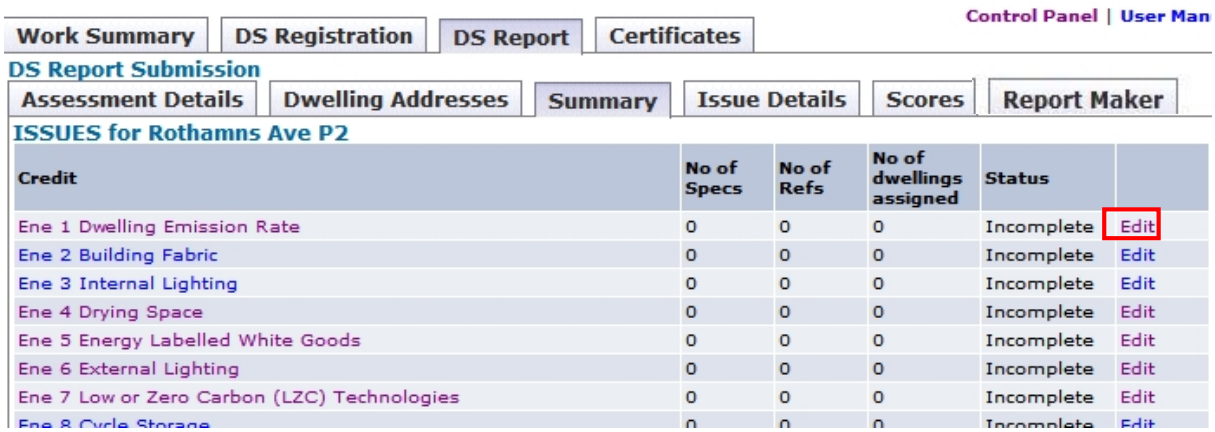
- The **Issue Summary** page for the selected assessment is displayed.


Control Panel | User Man
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for Rothamns Ave P2
Credit
No of Specs
No of Refs
No of dwellings assigned
Status
Ene 1 Dwelling Emission Rate 0 0 0 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit
Ene 8 Cycle Storage 0 0 0 Incomplete Edit
Ene 9 Home Office 0 0 0 Incomplete Edit
Wat 1 Indoor Water Use 0 0 0 Incomplete Edit
Wat 2 External Water Use 0 0 0 Incomplete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Incomplete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Incomplete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Incomplete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Incomplete Edit
Sur 2 Flood Risk 0 0 0 Incomplete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Incomplete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

9.1 Creating a new spec ID

- From the **Issue Summary** page, select the issue you wish to record specification details for, and click on the **Edit** text in the far right column for the issue.


Control Panel | User Man
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for Rothamns Ave P2
Credit
No of Specs
No of Refs
No of dwellings assigned
Status
Ene 1 Dwelling Emission Rate 0 0 0 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit

- The **Issue Details** page is displayed.

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Please Note ! The Issue Details tab can't be accessed directly. This tab is automatically highlighted by the system when an individual issue is opened from the **Issue Summary** page.

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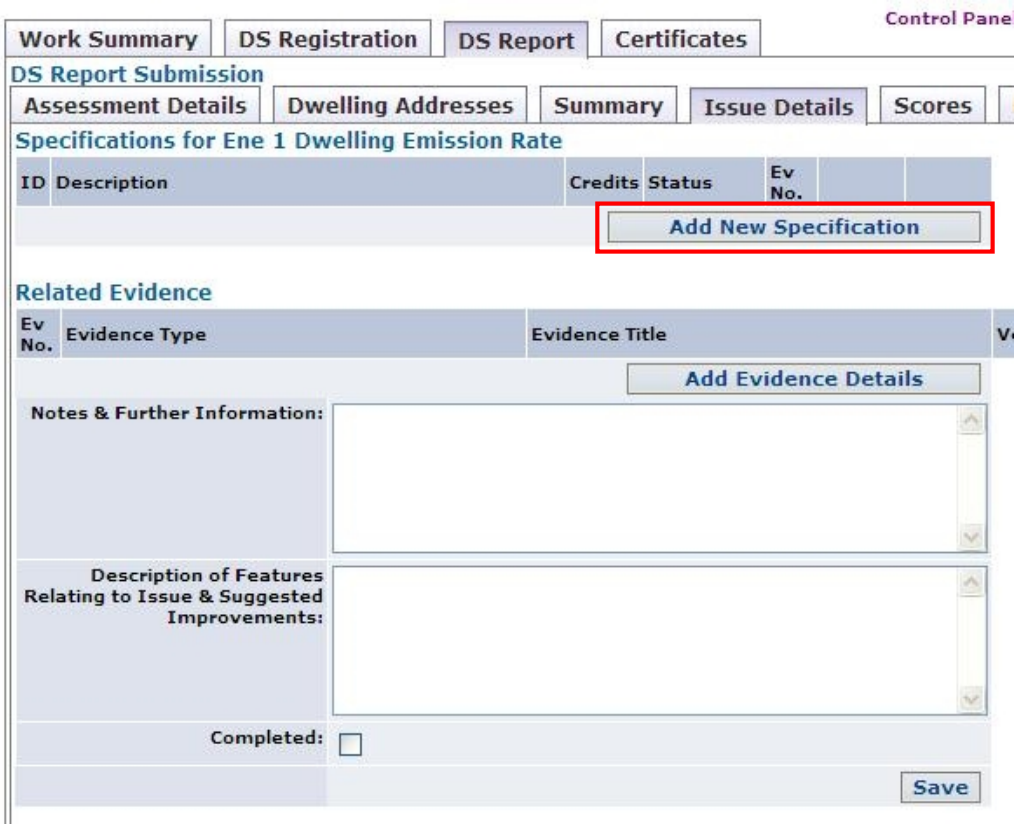
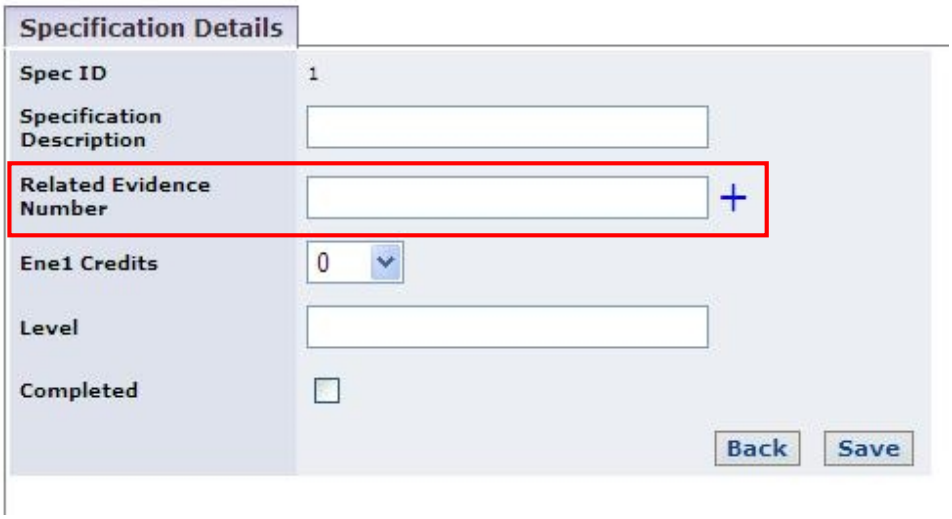
9.2 Adding a specification detail

- To create a new Spec ID, click on the **Add New Specification** button.



- The **Specification Details** page is displayed.
- Complete all fields on this page **(other than the related evidence number field – this should be completed after evidence has been entered)** and specify the number of credits awarded.



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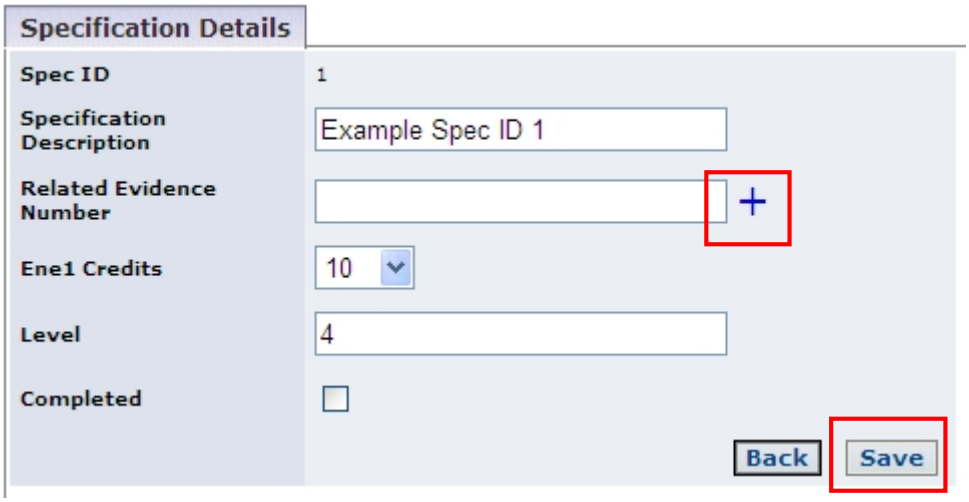
Please Note ! The **Related Evidence Number** field (highlighted in the image on the previous page) is used to indicate which evidence entries apply to an individual Spec ID. Entering evidence is discussed in the next section of this guide. Once evidence has been entered, the related evidence number field can be selected as appropriate for each spec ID by clicking on the Blue Cross symbol next to the field (see the image at the bottom of this page).

Once the Blue Cross has been clicked the Evidence Assignment tab is visible (as in the image above). This allows assignment of previously created evidence to the Spec ID currently being edited. All evidence items which exist within the issue will appear in this selection list. Simply click in the “Assign” box for the appropriate piece of evidence and then click “Save” to associate evidence to a Spec ID.

Please Note ! EVIDENCE ASSIGNMENT IS COVERED IN THE NEXT CHAPTER OF THIS MANUAL

Please Note ! Each Issue has different information requirements; please ensure credits are awarded in line with the criteria set out in the relevant version of the Code Technical Guide. Please ensure full and clear descriptions are used where appropriate. Any incorrectly awarded credits, or lack of clarity in descriptions could result in delays to the QA process and may result in delays in certification.

- Once all details are entered click the **Save** button



- The **Issue Details** page is displayed, with the incomplete spec ID on the spec ID table.

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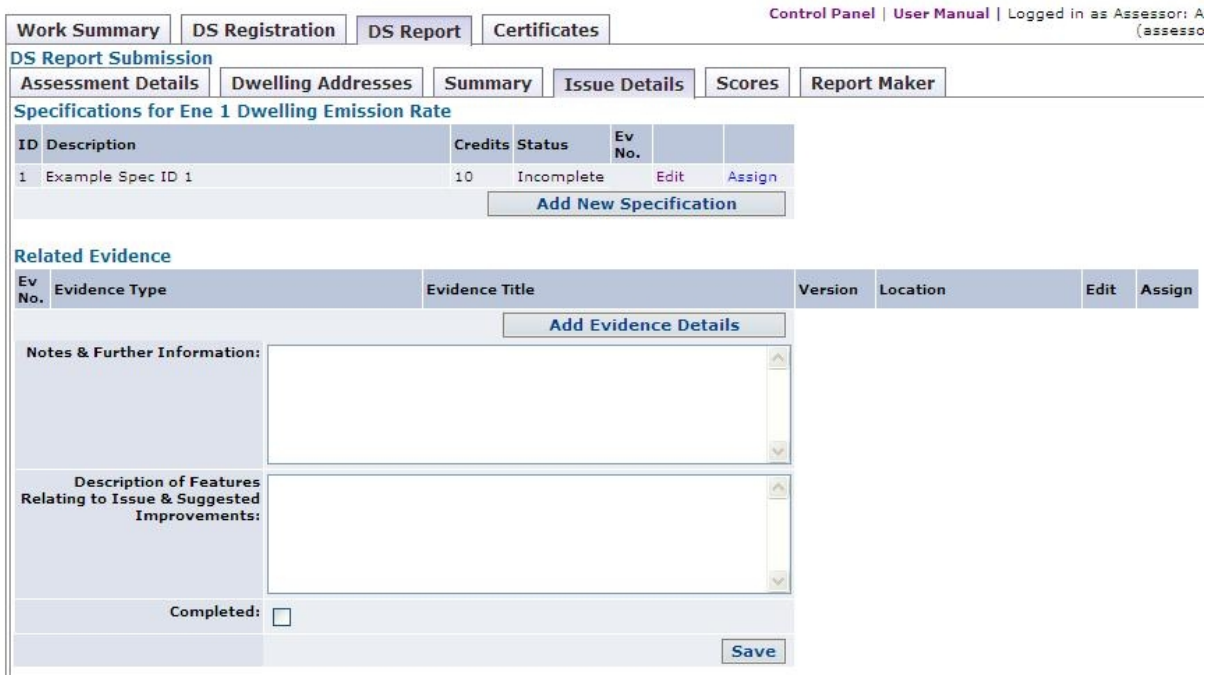

- Repeat the process described above for each unique specification for this issue.

Please Note ! All spec ID's and evidence must be completed before an issue can be ticked as complete.

9.3 Free text fields for supporting information

- On all spec ID detail forms; there are two boxes available to the assessor, **Notes and Further Information,** and **Description of Features Relating to Issue & Suggested Improvements.** Each field should be used to enter notes, or further information/ descriptive commentary that may help to justify the number of credits that have been awarded for a particular spec ID.

- It should be noted that these fields are NOT mandatory for completion.

Please Note ! Each free text field within the General Description of Site and Category Summary sections has a character limit of approximately 1700 characters (which includes spaces), which is around 40 full lines of text. If more than 1700 characters are entered, the system will not save any of the data entered into the field that is over this limit.

Please Note ! If the user is copying and pasting from Microsoft Word or any other proprietary word processing software, it is strongly advised that text is copied and pasted via Notepad. This ensures that no hidden formatting is carried across, which may cause report corruption.

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9.4 The Spec ID and Evidence Counters

- As spec ID's and pieces of evidence are added for each issue, the totals that appear on the issue summary screen will increase:

Control Panel | User Manual | Assessor : Avnish shah (assessor)
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for example working name
Credit
No of Specs
No of Refs
No of dwellings assigned
QA Scores
Status
Ene 1 Dwelling Emission Rate 1 1 0 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit
Ene 8 Cycle Storage 0 0 0 Incomplete Edit
Ene 9 Home Office 0 0 0 Incomplete Edit
Wat 1 Indoor Water Use 0 0 0 Incomplete Edit
Wat 2 External Water Use 0 0 0 Incomplete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Incomplete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Incomplete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Incomplete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Incomplete Edit
Sur 2 Flood Risk 0 0 0 Incomplete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Incomplete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

Please Note ! Only spec ID's that have been saved as 'complete' will be added to the 'No of specs' column.

Please Note ! If it is necessary to delete a spec ID for some reason then you must first ensure that the spec ID is not currently assigned to any dwellings.

9.5 Assigning a spec ID to a dwelling

- Once a Spec ID and related evidence have been recorded, the Spec ID must be linked to the dwellings to which it applies, this enables the report tool to calculate scores. It is recommended to assign Spec ID's to dwellings as they are recorded in the system.

- From the **Issue Details** page, click on the **Assign** text, at the far right column of the Spec ID to be assigned.

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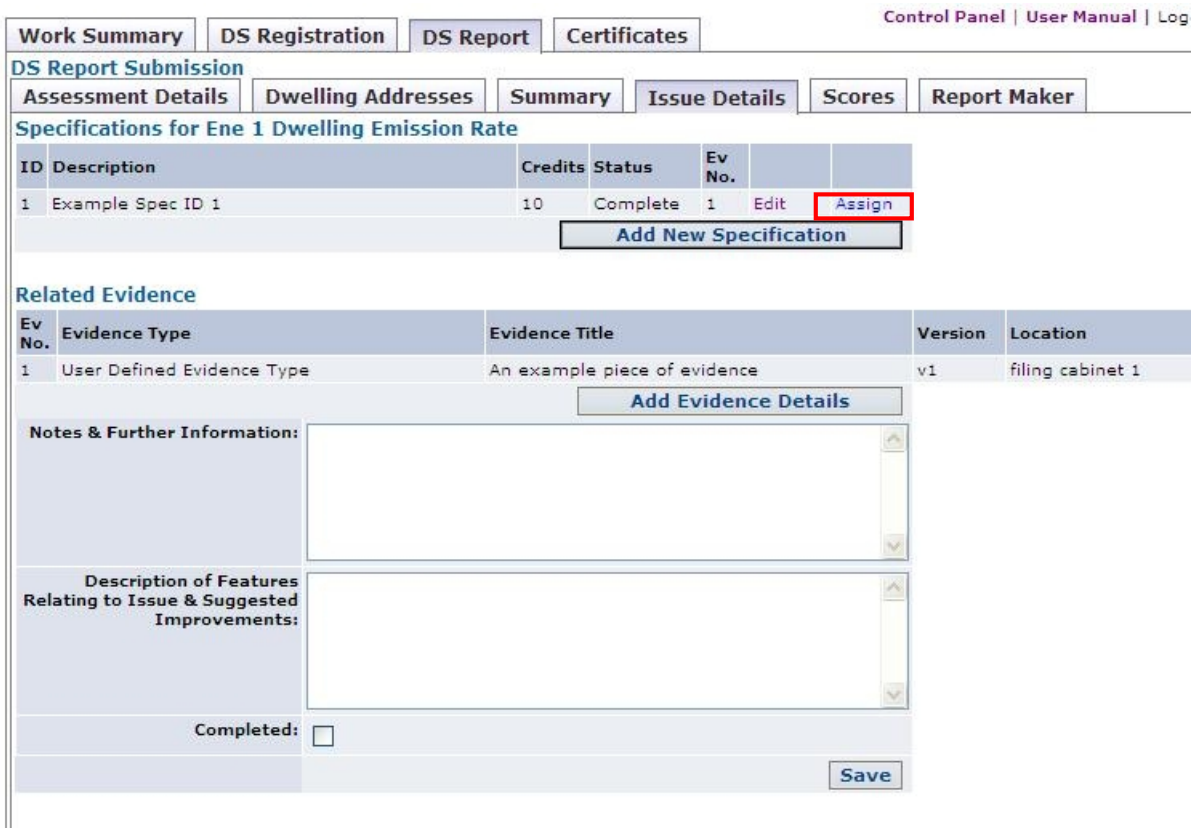
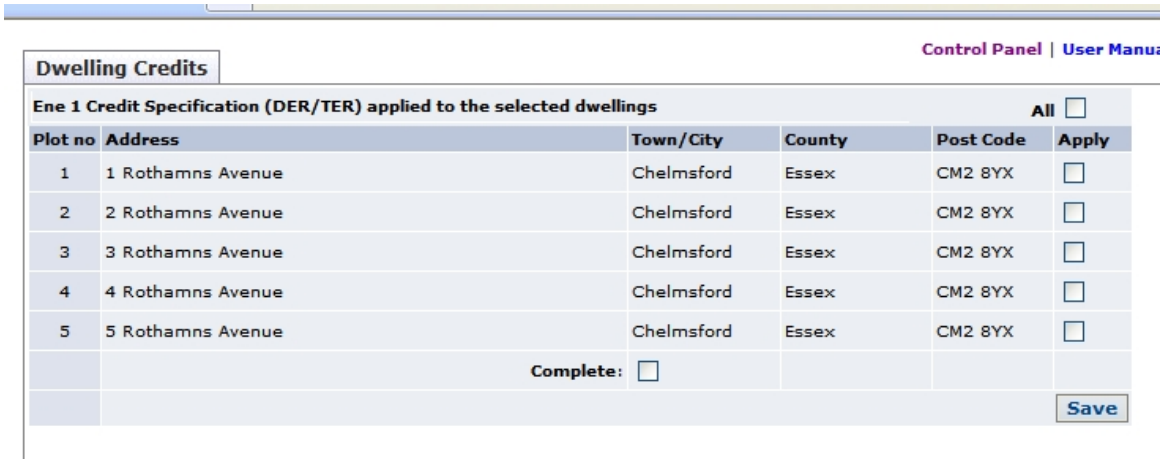


- A list of the dwellings entered so far is displayed.



- Tick the **Apply** tick box(es) for all dwellings which this Spec ID applies to. When assigning is completed, tick the **Complete** tick box and click the **Save** button.

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Control Panel | User Manu
Dwelling Credits
Ene 1 Credit Specification (DER/TER) applied to the selected dwellings
All
Plot no
Address
Town/City
County
Post Code
Apply
1 1 Rothamns Avenue Chelmsford Essex CM2 8YX
2 2 Rothamns Avenue Chelmsford Essex CM2 8YX
3 3 Rothamns Avenue Chelmsford Essex CM2 8YX
4 4 Rothamns Avenue Chelmsford Essex CM2 8YX
5 5 Rothamns Avenue Chelmsford Essex CM2 8YX
Complete:
Save

- Alternatively, if the spec ID should be applied to ALL dwellings displayed, the **All** tick box should be clicked. This will automatically tick all boxes:

Control Panel | User Manual
Dwelling Credits
Ene 1 Credit Specification (DER/TER) applied to the selected dwellings
All
Plot no
Address
Town/City
County
Post Code
Apply
1 1 Rothamns Avenue Chelmsford Essex CM2 8YX
2 2 Rothamns Avenue Chelmsford Essex CM2 8YX
3 3 Rothamns Avenue Chelmsford Essex CM2 8YX
4 4 Rothamns Avenue Chelmsford Essex CM2 8YX
5 5 Rothamns Avenue Chelmsford Essex CM2 8YX
Complete:
Save

- Repeat the process described above for each Spec ID, for every issue.
- The issue summary screen will display how many dwellings have been assigned for each issue. This is displayed under the **No of dwellings assigned** column:

PLEASE NOTE ! You cannot assign the same dwelling to more than one Spec ID within an issue. If by mistake, you assign a Spec ID within that issue, the original allocation of the Spec ID to that dwelling is automatically removed.

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Control Panel | User Manual | Assessor : Avnish shah (assessor)
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for example working name
Credit
No of Specs
No of Refs
No of dwellings assigned
QA Scores
Status
Ene 1 Dwelling Emission Rate 1 1 2 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit
Ene 8 Cycle Storage 0 0 0 Incomplete Edit
Ene 9 Home Office 0 0 0 Incomplete Edit
Wat 1 Indoor Water Use 0 0 0 Incomplete Edit
Wat 2 External Water Use 0 0 0 Incomplete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Incomplete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Incomplete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Incomplete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Incomplete Edit
Sur 2 Flood Risk 0 0 0 Incomplete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Incomplete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

Please Note ! Lower final scores will be achieved for dwellings which do not have all Spec ID's assigned. Please ensure that the total **No of dwellings assigned** tallies with the total number of dwellings in the report.

Please Note ! Where Spec ID's have been assigned to dwellings incorrectly, incorrect scores will be achieved. Delays could occur in the issuing of certificates if QA checks pick up any unassigned issues or incorrectly assigned Spec ID's.

9.6 Amending spec ID's

- Spec ID's can be updated, amended or deleted as required.

Please Note ! Spec ID's **cannot** be deleted whilst still assigned to dwellings.

- From the **Work Summary** page
- Click on the **Status** text for the assessment you wish to update.
- The **Assessment Details** page is displayed.
- Click on the **Summary** tab
- The **Issue Summary** page for the selected assessment is displayed.

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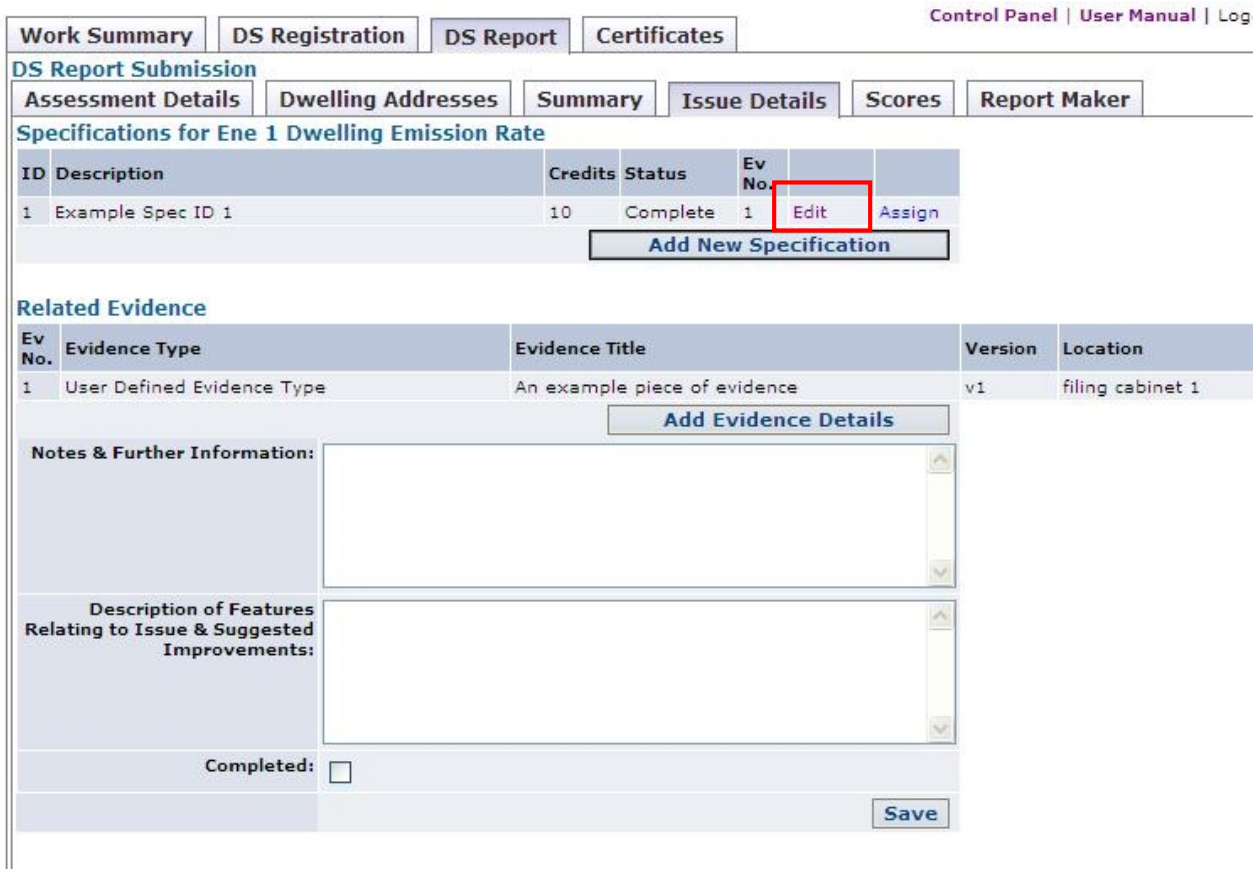
- Select the issue you wish to edit and click on the **Edit** text on the Issue Summary Page in the far right column for the issue.
- The **Issue Details** page is displayed.
- Select the Spec ID you wish to amend and click on the **Edit** text in the far right column for the Spec ID.



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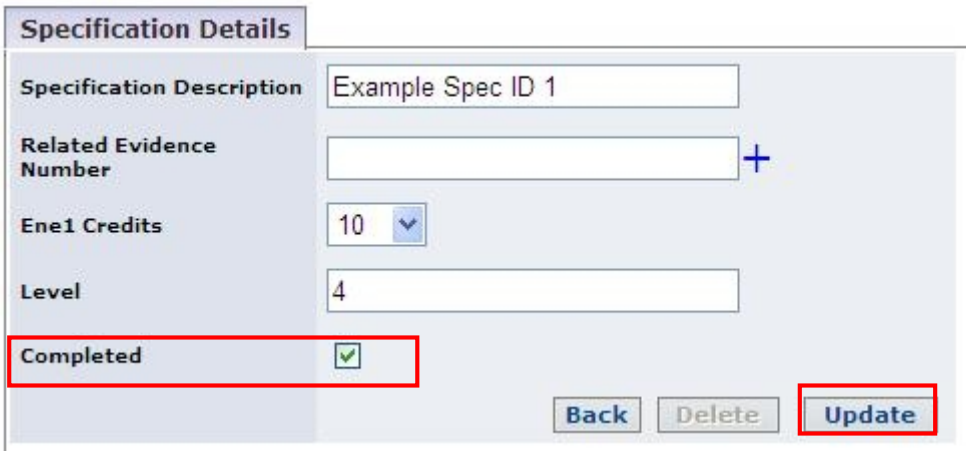
- Make any changes required, when amendments are complete, tick the **Completed** tick box and click the **Update** button.



9.7 Unassigning spec ID's

- From the **Issue Details** page.
- Select the Spec ID you wish to amend and click on the **Assign** text in the far right column for the Spec ID.
- Use the tick boxes and un-tick dwellings to un-assign, when un-assigning is complete, tick the ***Complete*** tick box and click the **Save** button.

- You can also click the **All** tick box, to un-tick all dwellings.

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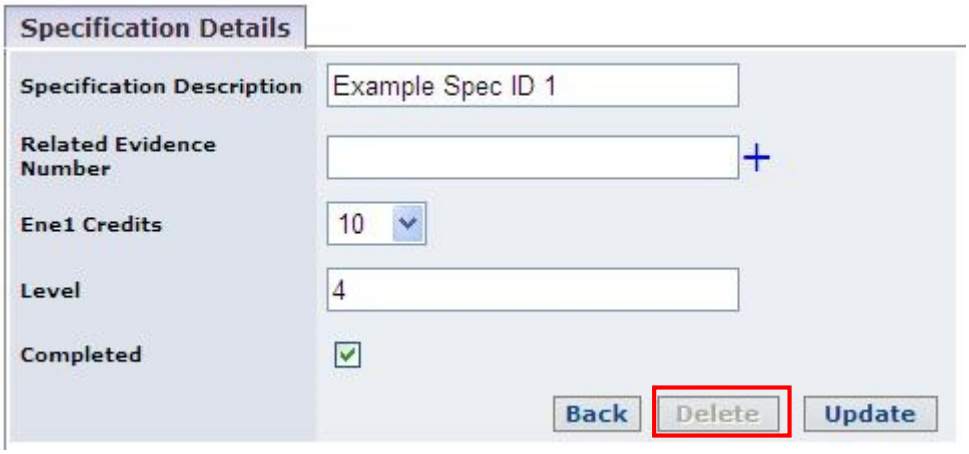
9.8 Deleting spec ID's

- Before attempting to delete a Spec ID, please ensure it is not assigned to any dwellings. If the **Delete** button is 'greyed out' please follow the Unassigning procedure described above:



- From the **Issue Details** page.
- Select the Spec ID you wish to delete and click on the **Edit** text in the far right column for the Spec ID.
- To delete this Spec ID, click the **Delete** button.
- A pop up warning message is displayed, if you are sure you wish to delete the Spec ID, click, **OK**.
- The **Issue Details** page is displayed.

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9.9 Helpful notes on Spec IDs

- Assessor feedback has indicated that a more detailed description of a Spec ID is required. This section endeavours to fully explain Spec IDs and their application.

9.9.1 Spec ID Description

- Once the assessment is registered and the summary details are entered, the next stage will be to describe and assess the range of specifications applicable for each dwelling against each of the 34 CSH issues. As specifications are recorded against each issue, the CSH system assigns them an ID number, hence they are referred to as Specification IDs, or "Spec IDs" for short.

- Spec IDs are linked to Evidence records which support the credits awarded in the Spec ID and to Address records, which links the credits awarded in the Spec ID to the individual dwellings and eventually produces the final score for certification.

- In the context of the Code for Sustainable Homes, a Spec ID can be defined as:

  "A method for describing how credits have been achieved for a particular issue."

- This 'Spec ID' not only describes how credits have been awarded but also links the number of credits awarded to a dwelling (or number of dwellings).

- For a development a CSH issue may have one or more ways of achieving credits across the development, each dwelling on the development may have a unique specification for that issue and as such a Spec ID would be recorded for each dwelling. Conversely, the specification may be the same for all dwellings or may apply to the site, e.g. some management and ecology issues are site wide, where this is the case one Spec ID will be created and assigned to all or a number of dwellings.

- A Spec ID has one or more Evidence records linked to it to show compliance with the issue criteria and to support credits awarded in the Spec ID, it is logical to create evidence records for an issue before creating the Spec ID so that evidence can be linked or 'assigned' to the Spec ID whilst it is being created. This will help to streamline the preparation of the report and save the assessor time.

- A Spec ID is linked to one or more dwellings to contribute to the overall score that the dwelling(s) achieves, it is logical to ensure all address records are created prior to creating Spec ID records, this will allow the assessor to link or 'assign' Spec IDs to dwelling as the Spec IDs are being created, this will help to streamline production of the report and save time. Once a Spec ID is created to describe how the criteria is met and number of credits achieved for an issue, the Spec ID is then assigned to a dwelling (or a number of dwellings) using the assign function.

- There may be one or more ways that credits are achieved for any issue in an assessment with more than one dwelling. Some of the BREEAM CSH Calculator Tools actually define Spec IDs for the assessor.

- As a Spec ID can be defined through the way in which credits are achieved, it could be applicable to one or more (possibly all) of the dwellings being assessed on the site. This should help to prevent duplication of information, and aid the assessor when the PCS assessment is undertaken.

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9.9.2 Spec ID fields

- A Spec ID has a number of pieces of information (or fields) required to be completed to fully describe how the credits are achieved for an issue. These are detailed below and are designed to provide all required information but to be as simple as possible.

ID Number

- The Spec ID – ID number is a system generated number which for each issue (e.g. Ene 1 -9, Wat 1, 2 etc.) starts a 1 and increases as more Spec IDs are added. There are not unique Spec ID – ID numbers across the whole assessment.

Spec ID Description

- The Description field is provided to give the assessor facility to give a meaningful name to each Spec ID. This is free text and can be used to show the way credits are being achieved for a particular house type, or to indicate the method or equipment used to achieve the credits.
- As an example, for any issue a Spec ID might be called – "House type A". This allows the assessor to show that for this house type all units are achieving the same number of credits, in the same way. It may be more helpful to have a few more words describing how the credits are achieved, although in some cases this example may be enough.
- Another example for the Ene 4 issue in an assessment of a dwelling with a 10 metre washing line, the Ene 4 Spec ID description could be "10 metre washing line". This Spec ID would be assigned to all dwellings with a 10m washing line.
- For issues where the credits are awarded for a site wide compliance such as for committing to achieve Beyond Best Practice in the Considerate Constructors scheme, the Spec ID description could be 'Considerate Constructors Beyond Best Practice'.

Credits

- A drop down list that indicates the number of credits awarded.

Level

- Where an issue has a mandatory requirement to achieve a certain score such as Ene 1 and Wat 1 the level achieved based on the credits awarded is automatically displayed.

Completed

- This tick box must be ticked to indicate that recording of the Spec ID is complete. If this box is not ticked, then the report will not be able to be submitted for certification

9.9.3 When do I need to create a new Spec ID?

- Spec IDs are designed to minimise the amount of inputting the assessor is required to do when preparing a report.
- Spec IDs can be created at the discretion of the assessor, The Ene 1 calculator tool defines the number Spec IDs to be created in this case the number of credits awarded for a dwelling or a

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group of dwellings defines a spec ID. For example, 2 detached houses and a group of flats all achieve 5 credits for Ene 1, then 1 Spec ID is created and assigned to all of these dwellings. Each highlighted line in the Spec ID Summary tab of the Ene 1 Calculator tool equates to a Spec ID for Ene 1.

- The assessor may choose to create more than one Spec ID for an issue where all dwellings achieve the same number of credits but achieve it in a different way. For example a 2 bed flat may get 1 credit for Ene 8 Cycle Storage for having storage for 1 cycle in a communal store and a 3 bed house may get 1 credit for having storage for 1 cycles in a compliant shed. The assessor can then choose to create 1 Spec ID perhaps described as Cycle Storage achieving 1 credit and assign to both dwellings or to create 2 Spec IDs, one described as Cycle storage for 1 cycle in the communal storage and the other described as Cycle Storage in the compliant shed.
- Remember you as the assessor should be able to clearly see how the credits awarded for an issue have been achieved and your client may wish to view a printout of the report which is easy to understand, so your Spec ID description should be relevant and clear. You will also need to ensure that you minimise the time spent producing the report without compromising accuracy and completeness. One final consideration is that when having your report QA checked the way your Spec IDs are created and described should be clear enough for the QA checker to be able to understand.

9.9.4 Must I create a spec ID where credits are not sought or not achieved?

- Yes, but only for the mandatory credit issues. The assessor may choose to create a Spec ID to demonstrate that credits were sought for an issue but not achieved and this may be useful to highlight to the client at design stage where credits are lost but could potentially be achieved at the post construction stage.

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10 Creating Evidence Records

The recording of evidence has proven a time consuming task in the past and has been a source of frustration for assessors. In consultation with assessors we have redesigned the Evidence record form which has 4 simple fields to complete to enable the assessor to clearly identify the document being referenced and for the QA auditor to easily locate the document on the evidence CD (or evidence folder). The Evidence record is then linked (assigned) to all issues for which it is to be used as supporting evidence and the Evidence record will be copied across to all issues selected. Evidence records can then be linked to the individual Spec IDs to which they are related.

The aim of the update is to make the task of recording evidence simpler for the assessor and to remove the need to duplicate evidence where the same item of evidence is used for more than one CSH issue.

The changes made to this module are significant, therefore it is recommended that assessors experiment with updated functionality on the training system, before entering live evidence records on the live system.

10.1 Improvements to the evidence module

Assessors can now create an evidence record, and assign that piece of evidence to each issue and Spec ID that it is applicable to. This means that items of evidence that apply to more than one Spec ID, now only have to be entered once.

The screen in which evidence records are created, now feature issue specific drop down lists containing issue specific pre-defined evidence types, which match the evidence requirements detailed in the CSH technical guidance document.

Also, the method for linking evidence with Spec IDs has been made simpler, easier and more robust.

10.2 Adding Evidence Records

Entering evidence is carried out within an individual assessment, from each individual Issue Details screen. An individual issue screen can be reached from the Issue Summary screen. See Figure 19., below.

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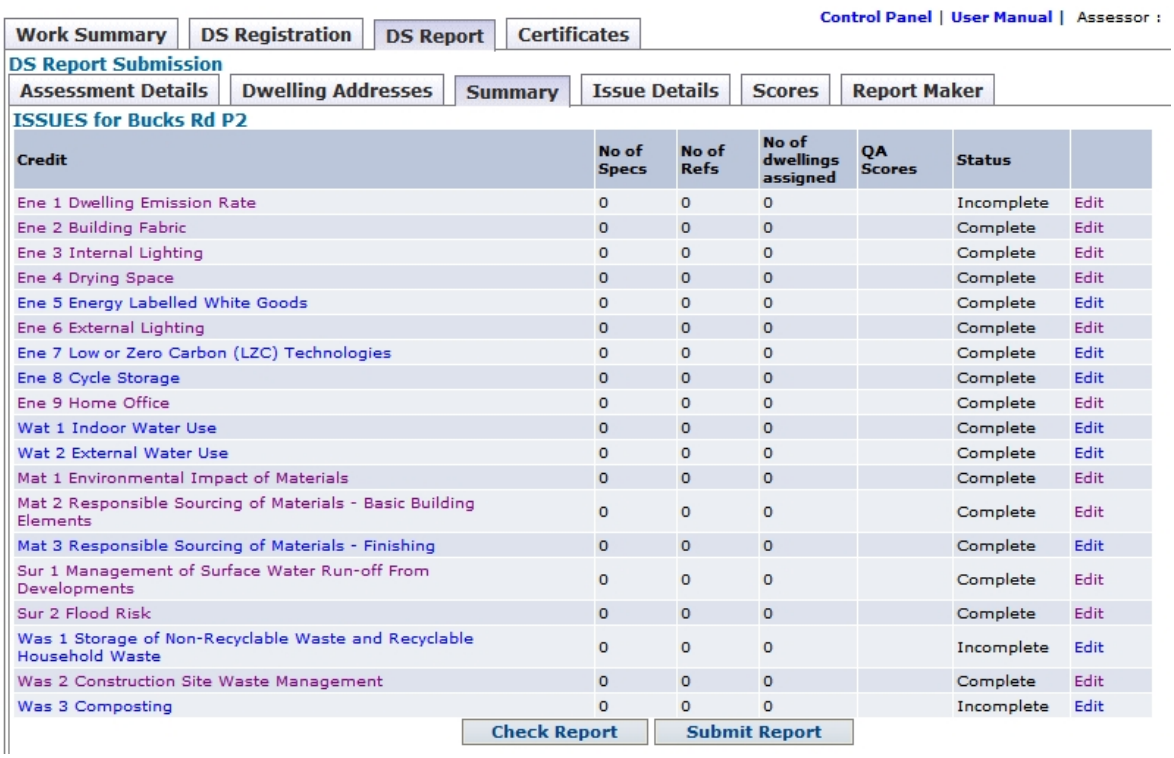
Control Panel | User Manual | Assessor :
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for Bucks Rd P2
Credit
No of Specs
No of Refs
No of dwellings assigned
QA Scores
Status
Ene 1 Dwelling Emission Rate 0 0 0 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Complete Edit
Ene 3 Internal Lighting 0 0 0 Complete Edit
Ene 4 Drying Space 0 0 0 Complete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Complete Edit
Ene 6 External Lighting 0 0 0 Complete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Complete Edit
Ene 8 Cycle Storage 0 0 0 Complete Edit
Ene 9 Home Office 0 0 0 Complete Edit
Wat 1 Indoor Water Use 0 0 0 Complete Edit
Wat 2 External Water Use 0 0 0 Complete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Complete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Complete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Complete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Complete Edit
Sur 2 Flood Risk 0 0 0 Complete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Complete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

To access an individual issue detail screen, click on the blue issue name or 'Edit' text for the applicable issue. The issue detail screen will be displayed, see Figure 20., below for the Ene1 issue.

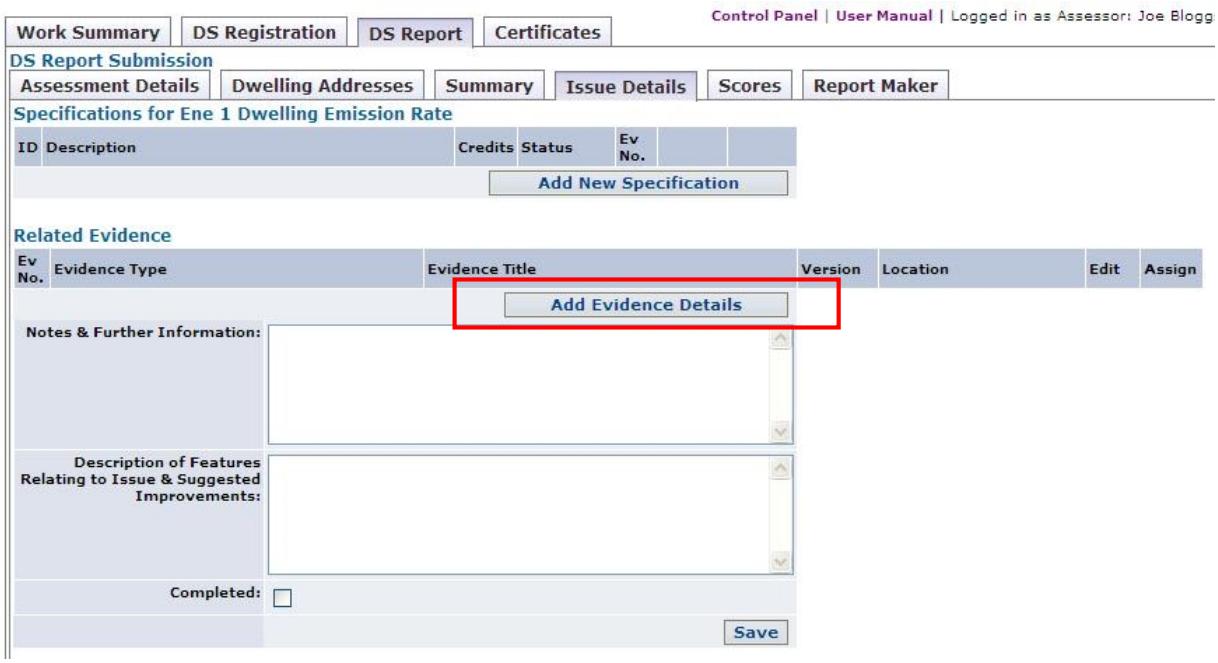

Fig 20. Ene 1 Issue Details Screen

To create a new evidence record, click on the 'Add Evidence Details' button:

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The Evidence Details screen is displayed, Figure 21., below.

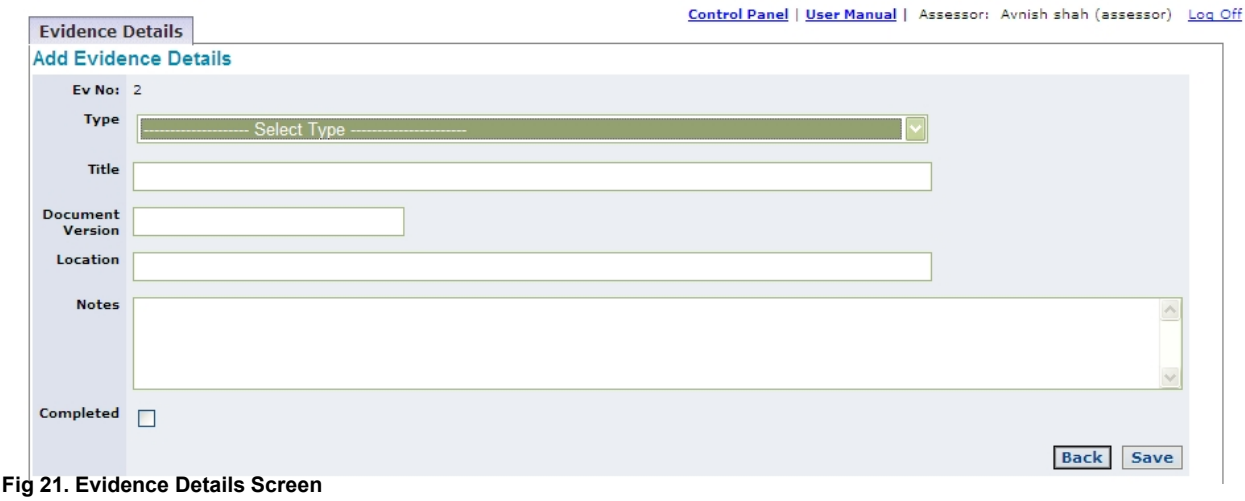

Fig 21. Evidence Details Screen

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10.3 The Evidence entry form explained

When entering evidence records four pieces of information are required, as follows;

- Evidence **Type** – The name of the type of evidence being recorded
- Evidence **Title** – The title (or type of user defined evidence) of the piece of evidence being recorded
- **Document / Version** – The unique number, reference number, revision or version of the evidence document being recorded
- **Location** – The file path and location of the evidence document on the Assessment Supporting Evidence CD
- **Notes** – For the assessor to make notes for BRE or themselves, to indicate location of document in assessors company filing system. Also this field can be used to elaborate on "User Defined Evidence".

10.3.1 Type field

Please Note ! This is a mandatory field

The assessor has 2 options for naming the type of evidence to be recorded.

The primary method for choosing the evidence type is through use of the type field which can be used to select a piece of evidence from a pre-populated drop down list.

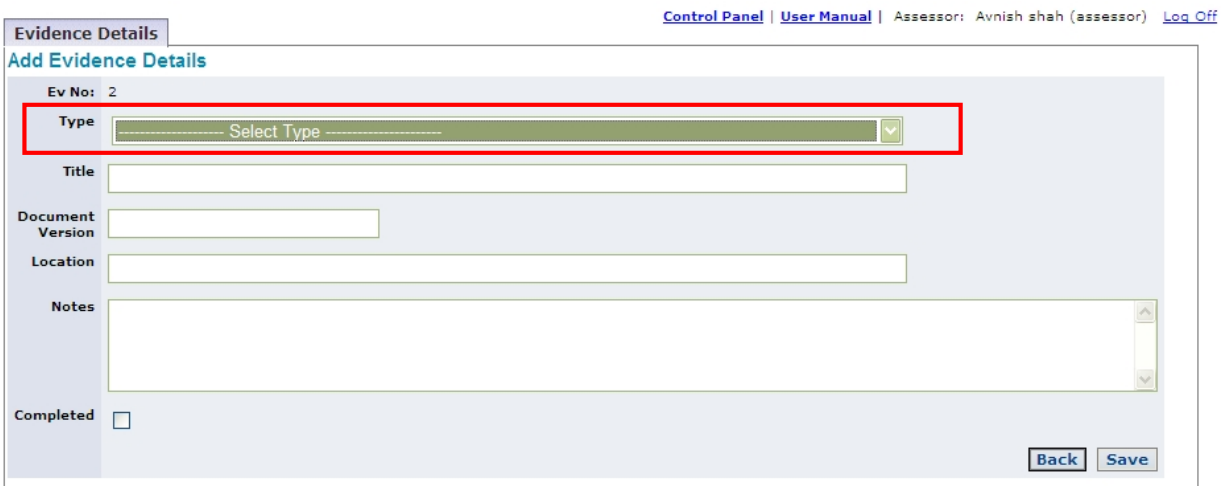

Fig 22. Evidence Details Screen

Within each issue the drop down list will contain some generic types of evidence such as 'Site drawings', and some types specific to that individual issue, the evidence types correspond with the CSH technical guidance document.

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Please Note! In some cases the names of items in the list of evidence types have been shortened and/or contain abbreviations. This ensures that item names fit into the field, and are still readable, relating fully to the evidence requirements in the CSH technical guide.

As an example, 'Design Stage - SAP 2005 Worksheets' are displayed within the drop down list for evidence entry for Ene1 in the Figure 23., below.

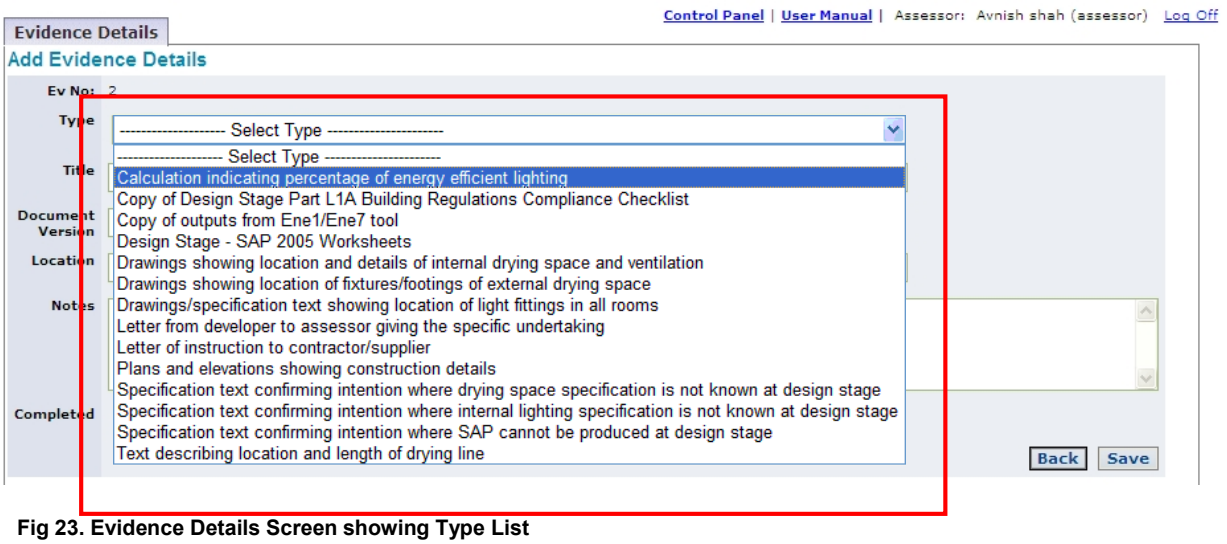
Control Panel | User Manual | Assessor: Avnish shah (assessor) Log Off
Evidence Details
Add Evidence Details
Ev No: 2
Type
Title
Document Version
Location
Notes
Completed
---------- Select Type ----------
---------- Select Type ----------
Calculation indicating percentage of energy efficient lighting
Copy of Design Stage Part L1A Building Regulations Compliance Checklist
Copy of outputs from Ene1/Ene7 tool
Design Stage - SAP 2005 Worksheets
Drawings showing location and details of internal drying space and ventilation
Drawings showing location of fixtures/footings of external drying space
Drawings/specification text showing location of light fittings in all rooms
Letter from developer to assessor giving the specific undertaking
Letter of instruction to contractor/supplier
Plans and elevations showing construction details
Specification text confirming intention where drying space specification is not known at design stage
Specification text confirming intention where internal lighting specification is not known at design stage
Specification text confirming intention where SAP cannot be produced at design stage
Text describing location and length of drying line
Back
Save

Fig 23. Evidence Details Screen showing Type List

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The secondary method for adding evidence is through manual entry. This function can be used by selecting the **User Defined Evidence Type** option from the drop down list on the Evidence Details screen, Figure 24., below.

Please Note ! For the purpose of transitioning evidence from the old method of recording to this new method, on assessments where evidence has already been filled in by the assessor, we have defaulted the evidence type to **User Defined Evidence Type**. However, when recording new evidence, the assessor must use one of the other acceptable evidence types from the drop down list, as much as possible.

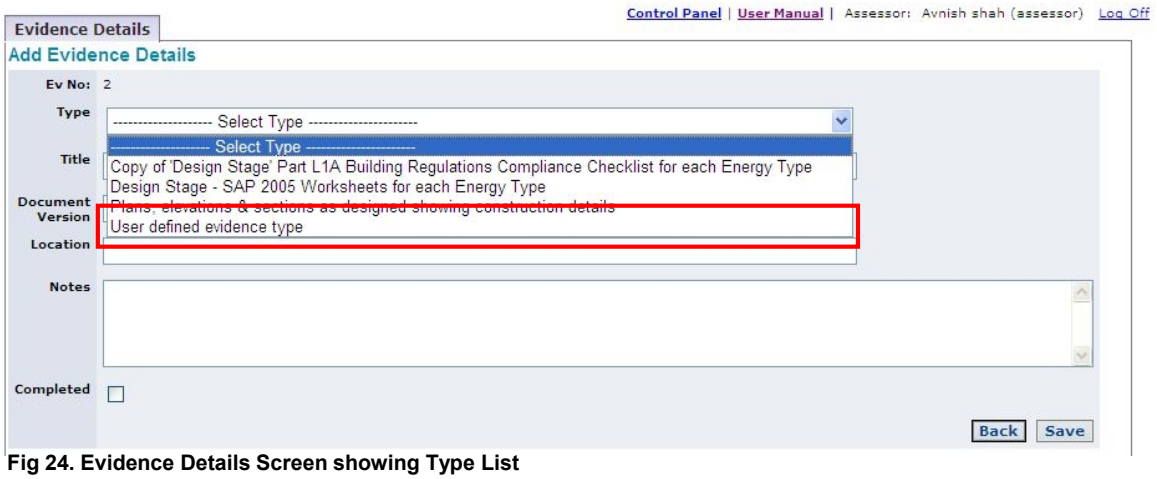
Control Panel | User Manual | Assessor: Avnish shah (assessor) Log Off
Evidence Details
Add Evidence Details
Ev No: 2
Type
---------- Select Type ----------
---------- Select Type ----------
Title
Copy of 'Design Stage' Part L1A Building Regulations Compliance Checklist for each Energy Type
Design Stage - SAP 2005 Worksheets for each Energy Type
Document Version
Plans, elevations & sections as designed showing construction details
User defined evidence type
Location
Notes
Completed
Back
Save

Fig 24. Evidence Details Screen showing Type List

The assessor is then able to create an evidence **Type** name as required.

10.3.2 Title field

Please Note ! This is a mandatory field

The purpose of this field is to describe the piece of evidence on the Issue Details screen if it is classified as a User Defined Evidence Type, or to add key points describing the piece of evidence if it is not user defined. This field can also enable the QA auditor to easily identify the document presented as part of the evidence supporting the award of credits for a dwelling(s).

This field is a free text field to be used by the assessor to record the Title of the document or item of evidence being recorded. In the case of a letter or email the title could include details of who the letter is To/From, Subject and date.

10.3.3 Document / Version field

Please Note ! This is a mandatory field

The purpose of this field is to enable the QA auditor to easily identify the document presented as part of the evidence supporting the award of credits for a dwelling(s).

This is a free text field to be used by the assessor to record the unique reference number, revision or version of the item of evidence being recorded. A range of unique reference numbers, revisions or versions can also be entered here if appropriate..

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10.3.4 Location

Please Note ! This is a mandatory field

The purpose of this field is to enable the QA auditor to quickly and easily locate the document presented as part of the evidence supporting the award of credits for a dwelling(s).

This field is a free text field to be used by the assessor to record the location of the evidence item on the CD containing supporting evidence.

10.3.5 Notes

This is an optional field

The purpose of this free text field is to enable the assessor to make notes for themselves or the QA auditor, Notes entered here are likely to provide further detail on an the item of evidence being recorded. The assessor may also wish to use this field to record the location of the document(s) within their own/company filing systems.

10.4 Saving the evidence record

Once all fields have been completed, the item of evidence can then be saved.

Tick the complete tick box field, and click the **Save** button.

10.5 Assigning or Linking Evidence Records to Spec IDs

As part of the assessment of each individual CSH issue within the system, the assessor must indicate which evidence records support the credits that have been awarded for each Spec ID.

The CSH AAP system provides the ability for assessors to create a link between Spec IDs and evidence records. This assignment is performed in the individual Spec ID detail screen.

Assigning evidence records to Spec IDs provides an auditable trail for the award of credits for an issue.

The evidence record must be created before it can be linked to a Spec ID. Therefore it is wise to create evidence records first and then to link in the evidence when creating the Spec IDs. This will help to save time in preparing the assessment.

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10.6 Spec ID Detail Screen

When viewing the Issue Details screen for any of the 34 Code Issues, the Spec ID detail screen is accessed by clicking on the **Add New Specification** button or by clicking on the blue **Edit** text for an existing Spec ID record.

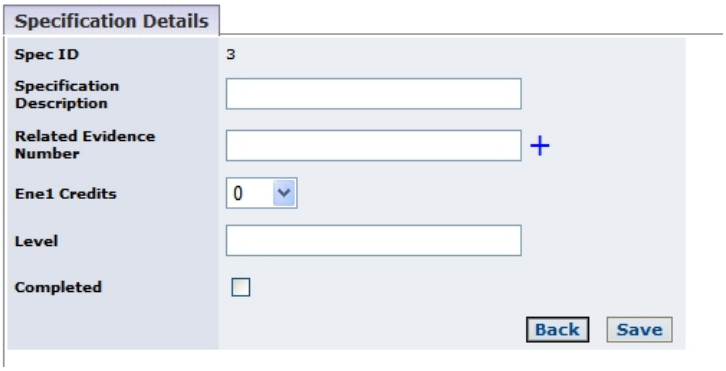

Fig 25. Spec ID Details Screen

Creating the link between a Spec ID and one / many pieces of evidence is achieved through the Spec ID detail screen, for each individual Spec ID.

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10.7 Creating a link

In the example in Figure 26. below, the user wishes to link Spec ID 1, with evidence record number 1:

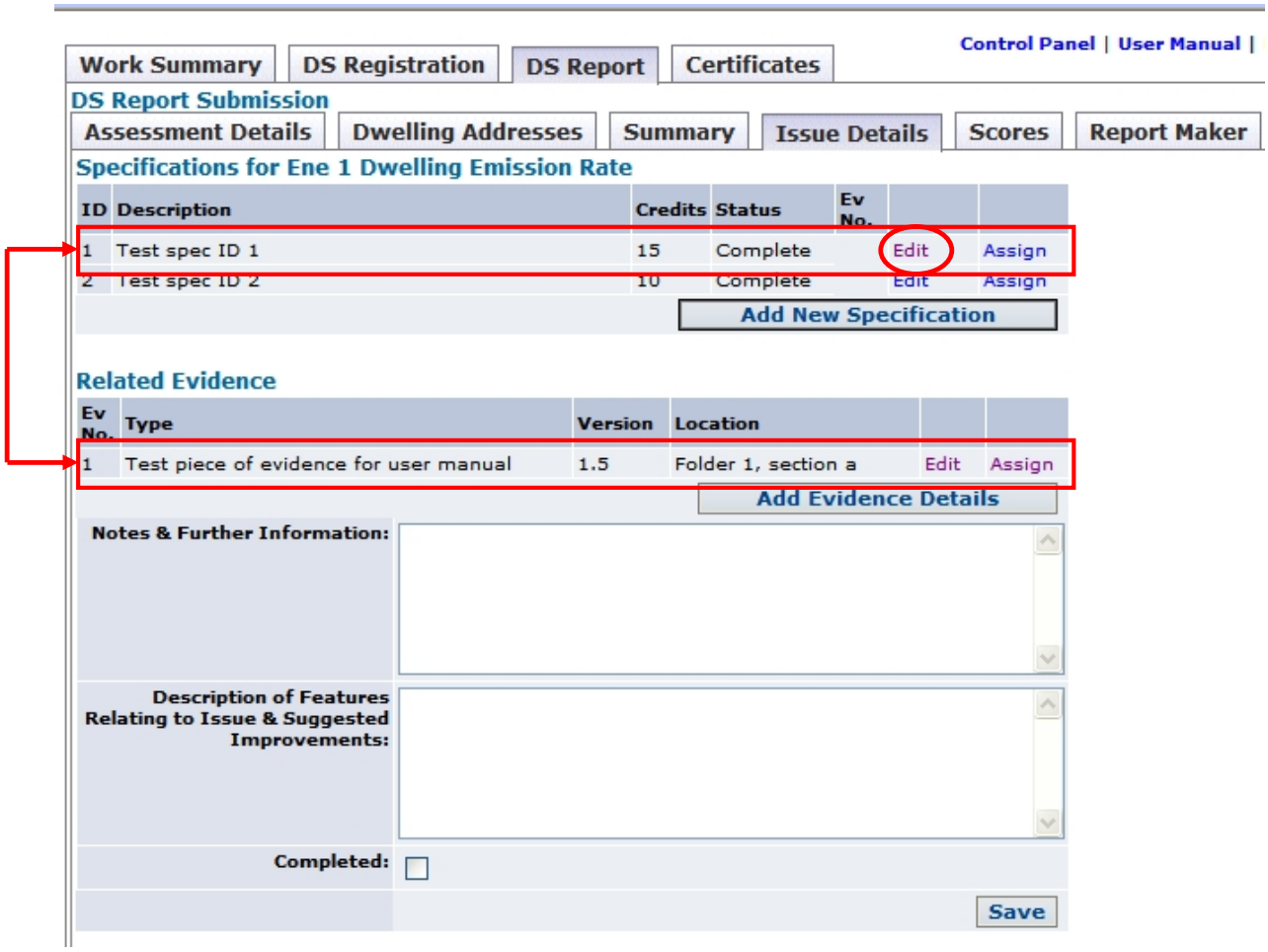

Fig 26. Issue Details Screen showing Spec ID and Evidence record to be linked

To do this, the Spec ID detail form for Spec ID must be opened, by selecting the **Edit** text on the Spec ID number 1 record. Figure 27., below.

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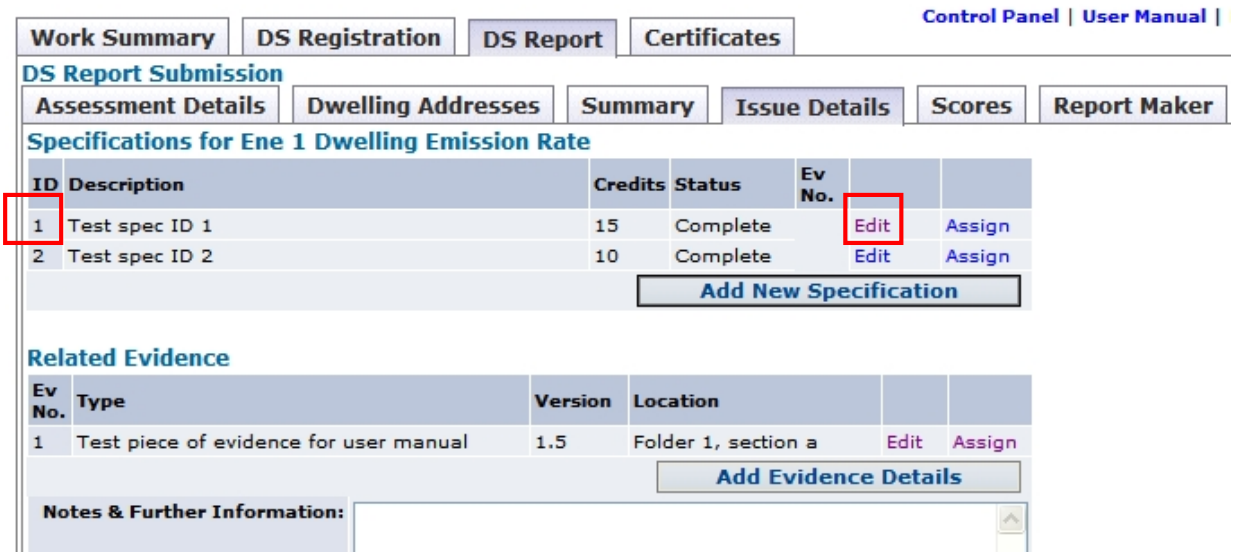

Fig 27. Issue Details Screen showing Edit option

The **Spec ID Detail** screen is displayed, Figure 28., below.

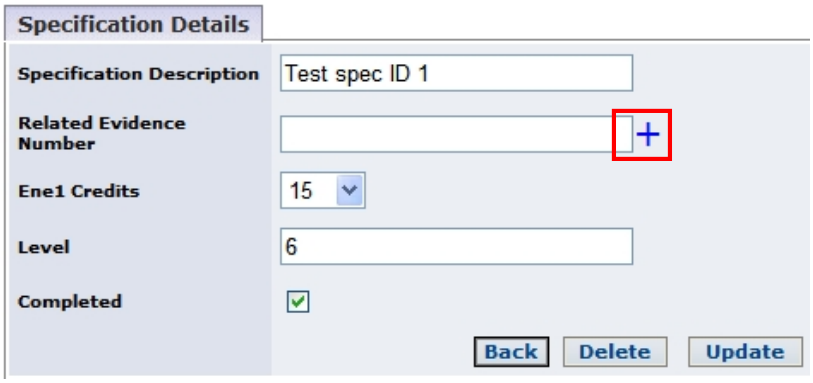

Fig 28. Specification Details (Spec ID Detail) Screen

Click on the Blue Cross to begin the process of selecting and assigning Spec IDs and evidence records. The Blue Cross is located at the end of the Related Evidence Number field as shown in Figure 28., above.

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The Evidence Assignment screen is displayed, Figure 29., below. This screen lists all evidence that has been entered for the issue (in this case, Ene1).

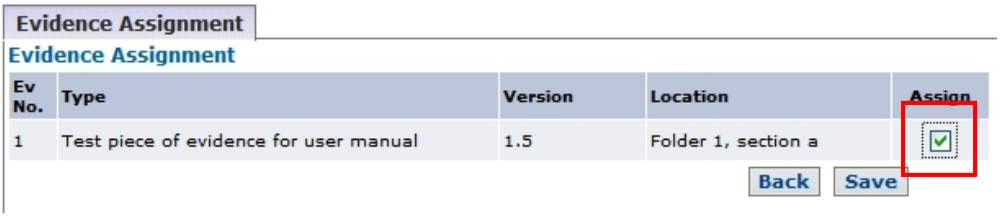

Fig 29. Evidence Assignment Screen

To link an evidence record with an individual Spec ID, tick the check box(es) for the evidence record as appropriate:

When all required evidence records have been selected, click on the **Save** button.
The system will then display the Spec ID detail screen, where the link to the evidence record will be shown as the evidence record ID number in the Related Evidence Number field, on the Spec ID detail screen, Figure 30., below.

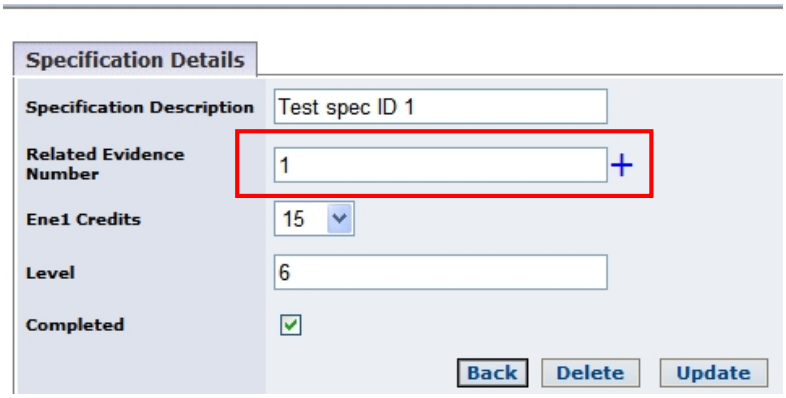

Fig 30. Specification Details (Spec ID Details) Screen

The link can be seen also on the issue summary screen, Figure 31., below.

Please Note! In certain situations where evidence has already been linked to Spec IDs using the old method of evidence linking, the assessor may have to re-link the evidence using this new method. The assessor will be prompted to do this, if this is the case.

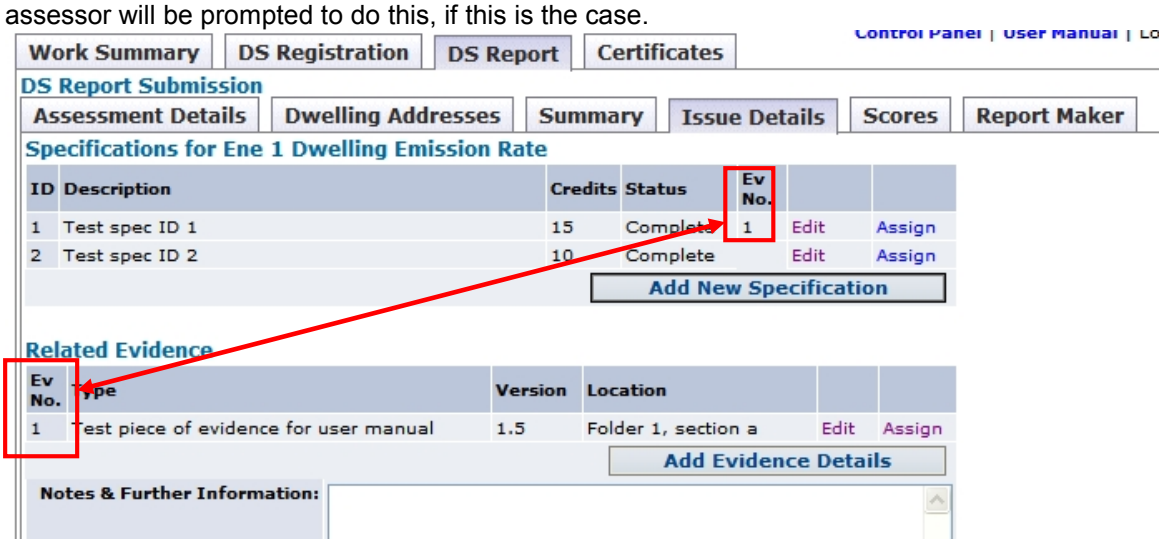

Fig 31. Issue Details Screen showing evidence / Spec ID link

In the example shown in Figure 32., below, the user has linked evidence ID 1 with Spec ID 1 and all 3 pieces of evidence with Spec ID 2.

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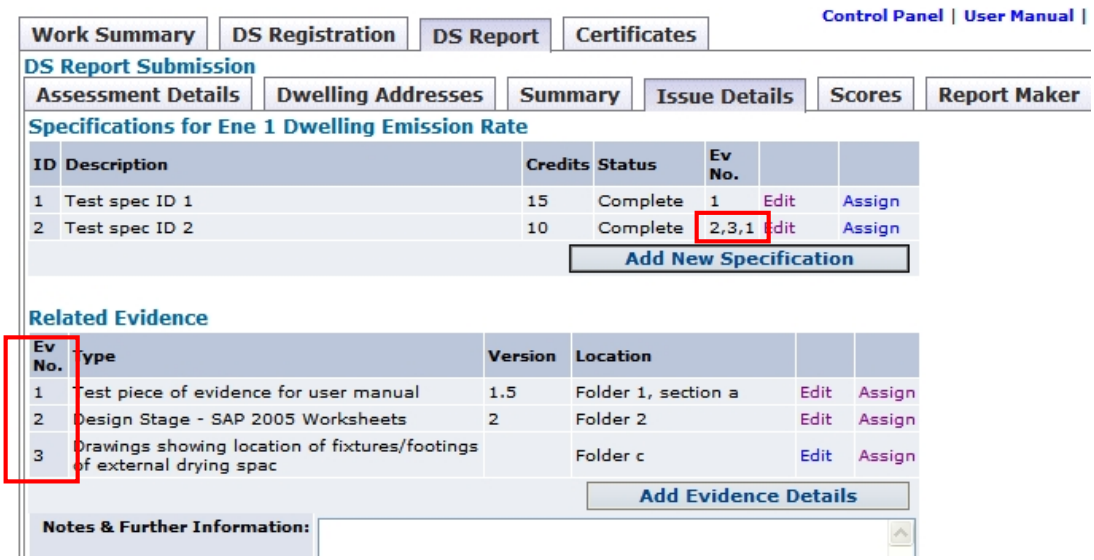
Control Panel | User Manual |
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Specifications for Ene 1 Dwelling Emission Rate
ID Description Credits Status Ev No.
1 Test spec ID 1 15 Complete 1 Edit Assign
2 Test spec ID 2 10 Complete 2,3,1 Edit Assign
Add New Specification
Related Evidence
Ev No. Type Version Location
1 Test piece of evidence for user manual 1.5 Folder 1, section a Edit Assign
2 Design Stage - SAP 2005 Worksheets 2 Folder 2 Edit Assign
3 Drawings showing location of fixtures/footings of external drying spac Folder c Edit Assign
Add Evidence Details
Notes & Further Information:

Fig 32. Issue Details Screen showing evidence / Spec ID link

10.8 Removing links

Removing links between a Spec ID and a piece / several pieces of evidence, can be achieved by reversing the process detailed above.

Open the **Spec ID Detail** screen for the specific Spec ID, click on the Blue Cross to access the **Evidence Assignment** screen and un-tick the check boxes under the **Assign** column, for each piece of evidence, as appropriate. Once this has been completed, save all changes.

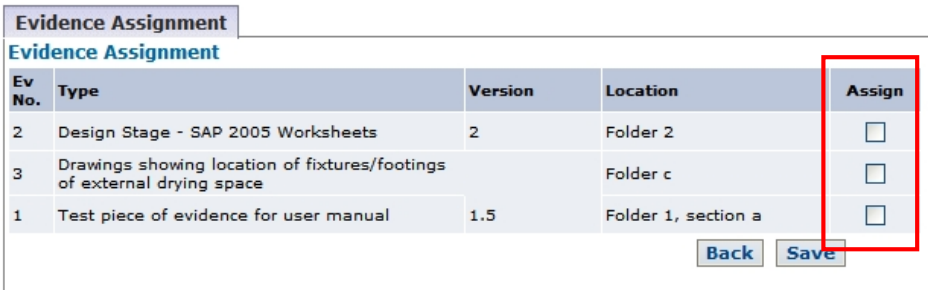
Evidence Assignment
Evidence Assignment
Ev No. Type Version Location Assign
2 Design Stage - SAP 2005 Worksheets 2 Folder 2
3 Drawings showing location of fixtures/footings of external drying space Folder c
1 Test piece of evidence for user manual 1.5 Folder 1, section a
Back
Save

Fig 33. Evidence Assignment Screen

Once saved, the **Spec ID Detail** screen shows that the link between the Spec ID and evidence records have been removed, Figure 34., below.

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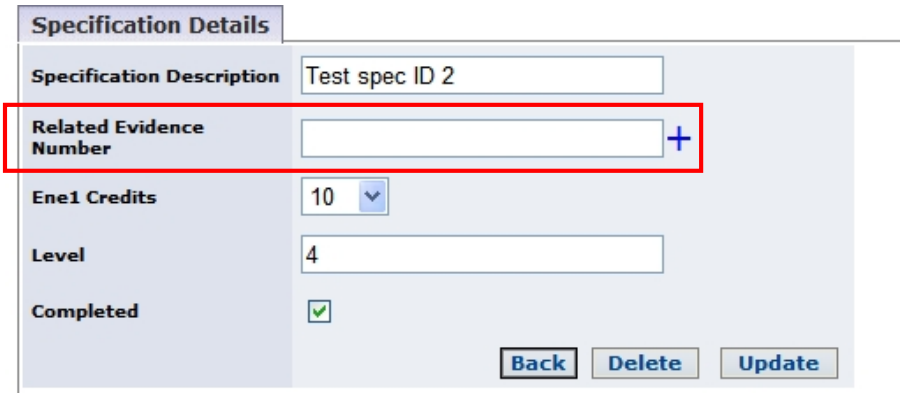

Fig 34. Specification Details (Spec ID Details) Screen

Click the **Update** button to save changes here also, changes made can be seen displayed on the Issue Details screen, Figure 35., below.

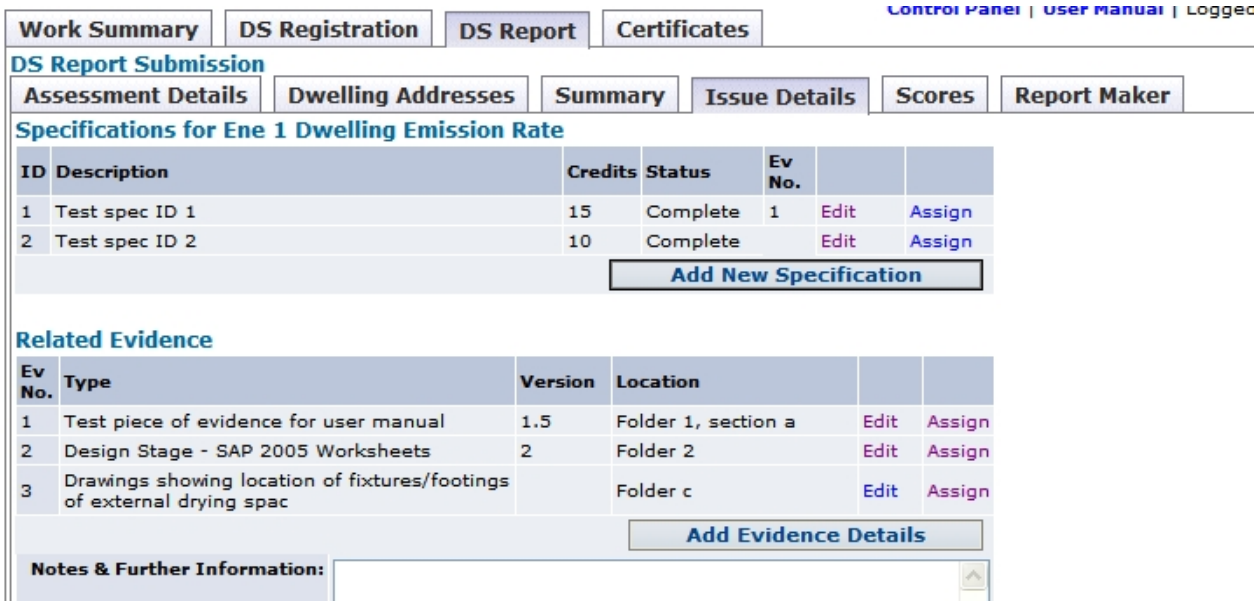
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Specifications for Ene 1 Dwelling Emission Rate
ID Description Credits Status Ev No.
1 Test spec ID 1 15 Complete 1 Edit Assign
2 Test spec ID 2 10 Complete Edit Assign
Add New Specification
Related Evidence
Ev No. Type Version Location
1 Test piece of evidence for user manual 1.5 Folder 1, section a Edit Assign
2 Design Stage - SAP 2005 Worksheets 2 Folder 2 Edit Assign
3 Drawings showing location of fixtures/footings of external drying spac Folder c Edit Assign
Add Evidence Details
Notes & Further Information:

Fig 35. Issue Details Screen

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10.9 Helpful Notes on Application of Evidence

Once an evidence record has been created, the issues it can be assigned to are limited to those that the Code guidance requires that evidence type for (with one or two exceptions). Some evidence types are available to be assigned to all issues.

The evidence record will appear in the issue detail screen of the issues to which the assessor has assigned it.

A single evidence record can be used for / assigned to many Spec IDs within the same issue. And where evidence is assigned to more than one issue, it can be assigned to many Spec IDs within those issues.

If an evidence record is assigned to many issues, you may go into any single issue summary screen for issues it is assigned to and edit or delete the evidence record there; this will not affect this evidence record in any other issue.

Where there is a requirement to make a universal change to an evidence record, assigned to more than one issue, the assessor would need to create a new evidence record with the new information and assign it to all relevant issues, the assessor will then need to ignore (not assign, and / or un-assign) the original superseded evidence record, or a more tidy solution would be to first un-assign the evidence record if assigned and delete the superseded evidence record.

Where you wish to use an evidence type which is not in the drop down list of the Add Evidence Details screen, you can select and apply the "User Defined Evidence Type" in the same way as any other evidence type.

If you have correctly completed each evidence record that you had input prior to this update, then it is not necessary for you to amend the evidence to comply with the new requirements. To help avoid the need to rework all existing evidence records, we have pre-selected the evidence type to "user defined evidence type".

If however you have a need to edit any of the evidence records that you had previously completed (prior to the update), or you have to add new evidence, then you will be required to complete the mandatory fields on the Add Evidence Details screen.

Please Note! The aim of capturing evidence on the system is to provide an audit trail. As long as evidence is recorded in some way it can be grouped according to preference within the scope of the CSH Technical Guidance document.
e.g. If there are ten drawings then it is simpler to reference the range of site drawings as 1-10 under one evidence entry rather than ten separate evidence entries.

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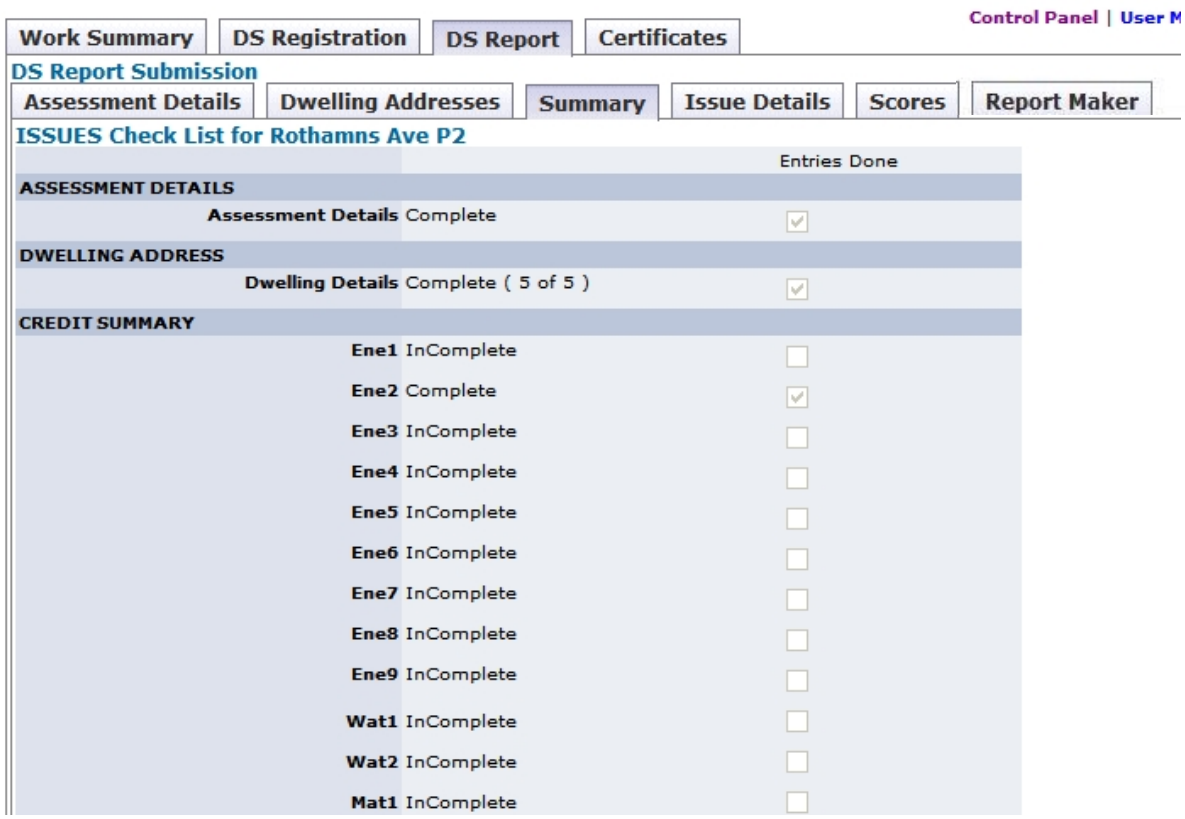
11 Checking the Report

11.1 The check list screen

- This functionality is provided in order to allow the user (at any stage of the submission process), to see at a glance the completion status of:
    - The Assessment Details Form
    - Dwelling Addresses
    - All Issues (and therefore spec ID's)



- If you have not ticked the **Completed** tick box through either omission or to act as a reminder for later, this functionality will highlight those 'incomplete' dwelling addresses or Spec ID's.
- If you attempt to submit the report with any incomplete records the **Issues Check List** page will be displayed.

Please Note! Reports cannot be submitted to the system without all addresses and Spec ID's being complete.

- To check your report for completeness:
- From the **Work Summary** page.
- Click on the **Status** text for the assessment you wish to update.

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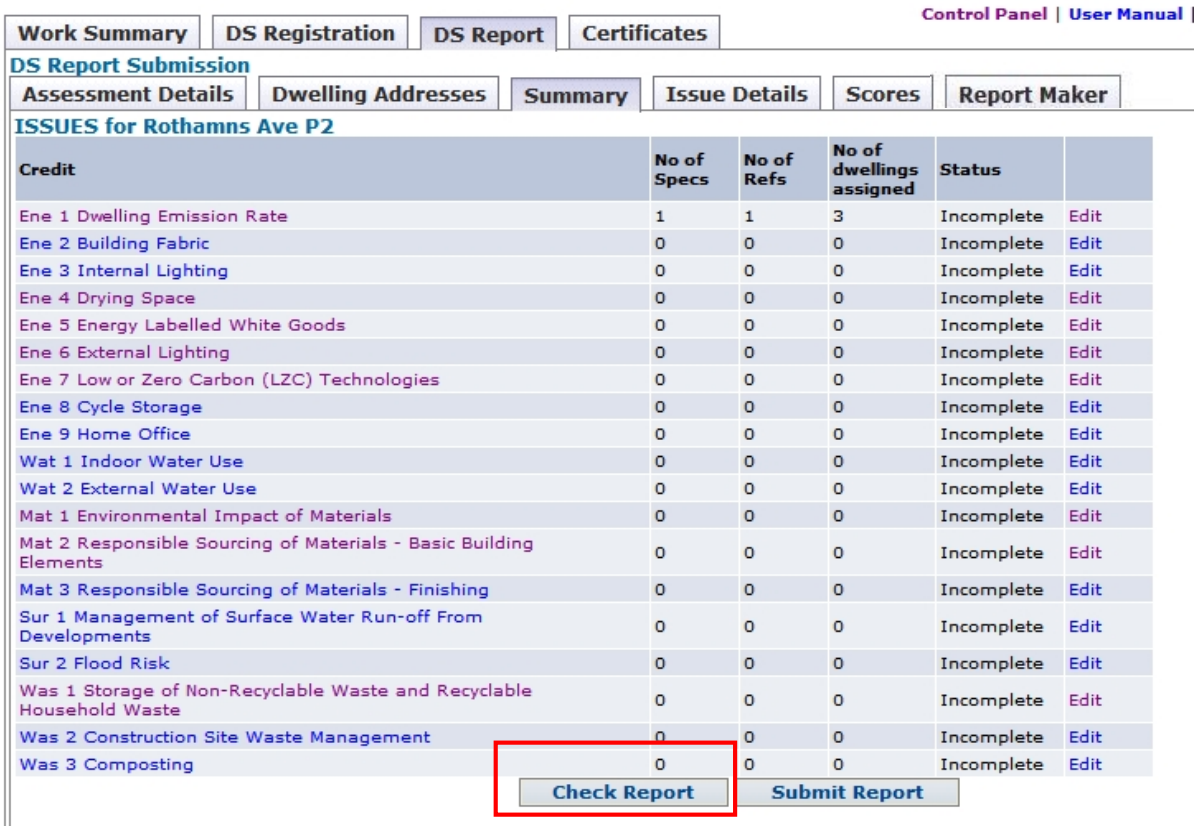
- The **Assessment Details** page is displayed.
- Click on the **Summary** tab.
- The **Issue Summary** page for the selected assessment is displayed.
- Click the **Check Report** button.


Control Panel | User Manual |
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for Rothamns Ave P2
Credit
No of Specs
No of Refs
No of dwellings assigned
Status
Ene 1 Dwelling Emission Rate 1 1 3 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit
Ene 8 Cycle Storage 0 0 0 Incomplete Edit
Ene 9 Home Office 0 0 0 Incomplete Edit
Wat 1 Indoor Water Use 0 0 0 Incomplete Edit
Wat 2 External Water Use 0 0 0 Incomplete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Incomplete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Incomplete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Incomplete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Incomplete Edit
Sur 2 Flood Risk 0 0 0 Incomplete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Incomplete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

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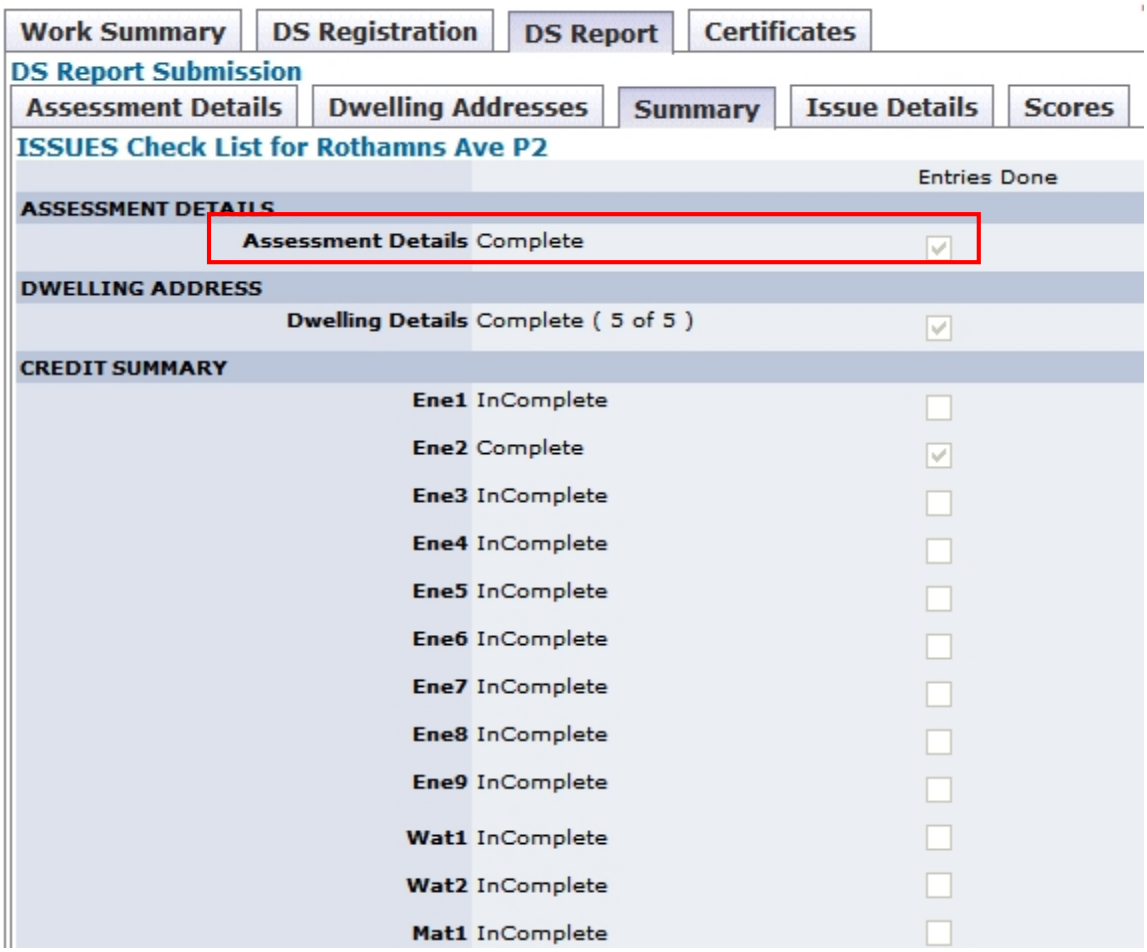
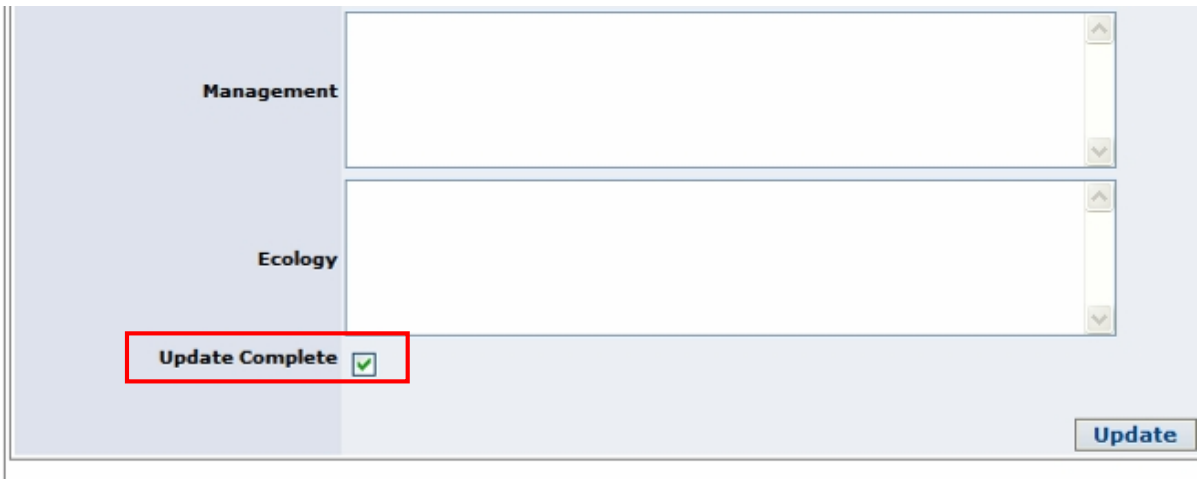
11.2 The assessment details check



- The first area of the check list screen verifies the status of the assessment details form.
- In order for this section to be complete, the assessment details form (reached from the assessment details tab) has to be saved with the **Update Complete** box ticked:



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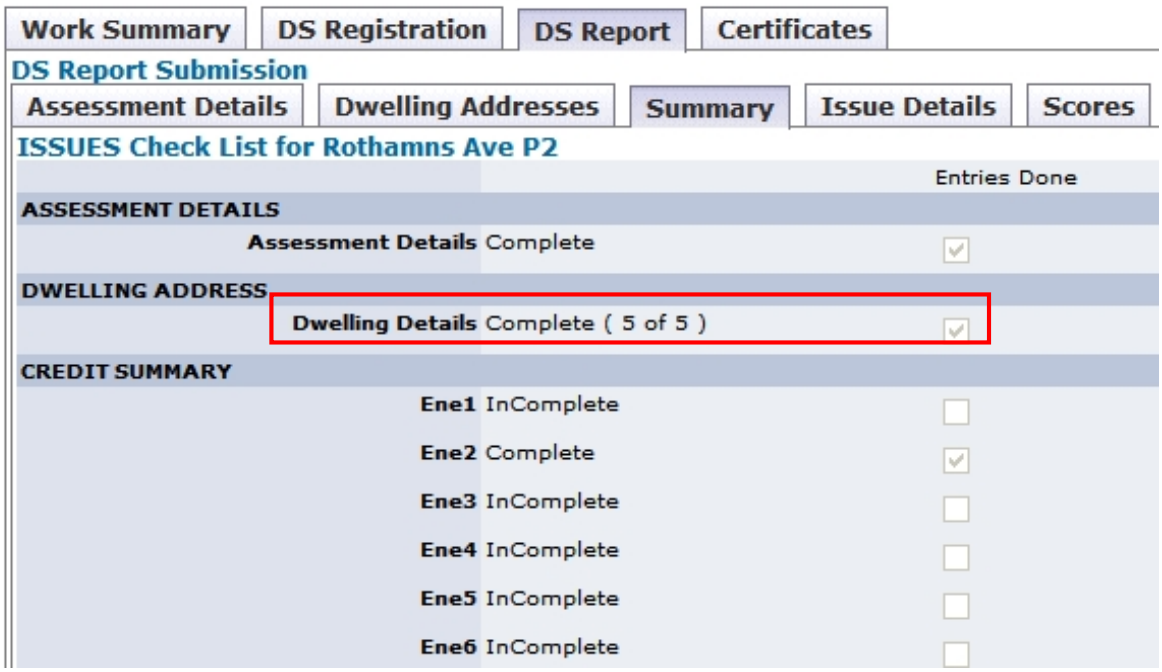
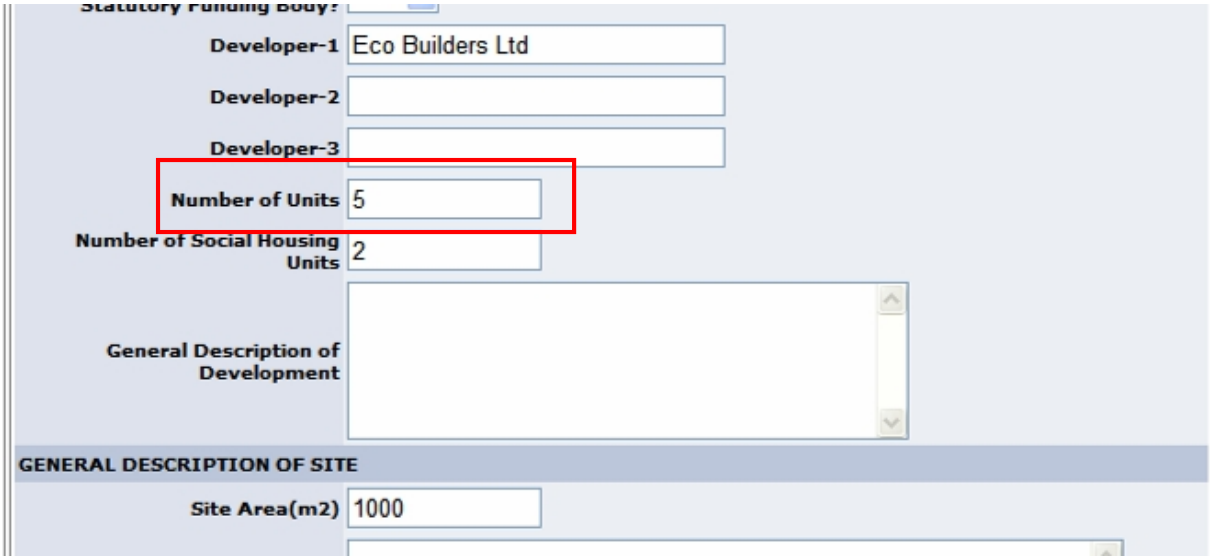
11.3 The dwelling addresses check



- The second area of the check list shows the assessors if the correct number of dwelling addresses have been entered, and also if each dwelling address has been marked as complete.

- There are two stages to generating the complete status for this part of the report check, as indicated with the '5 of 5' part.
  - The first 5 refers to the number of dwelling addresses that have been entered so far by the assessor. Please note that this figure represents **completed** dwelling address records **ONLY**.
  - The second figure refers to the number of dwelling addresses that the report should contain. This figure is carried across from the 'Number of Units' field, which is completed by the assessor on the Assessment Details form:



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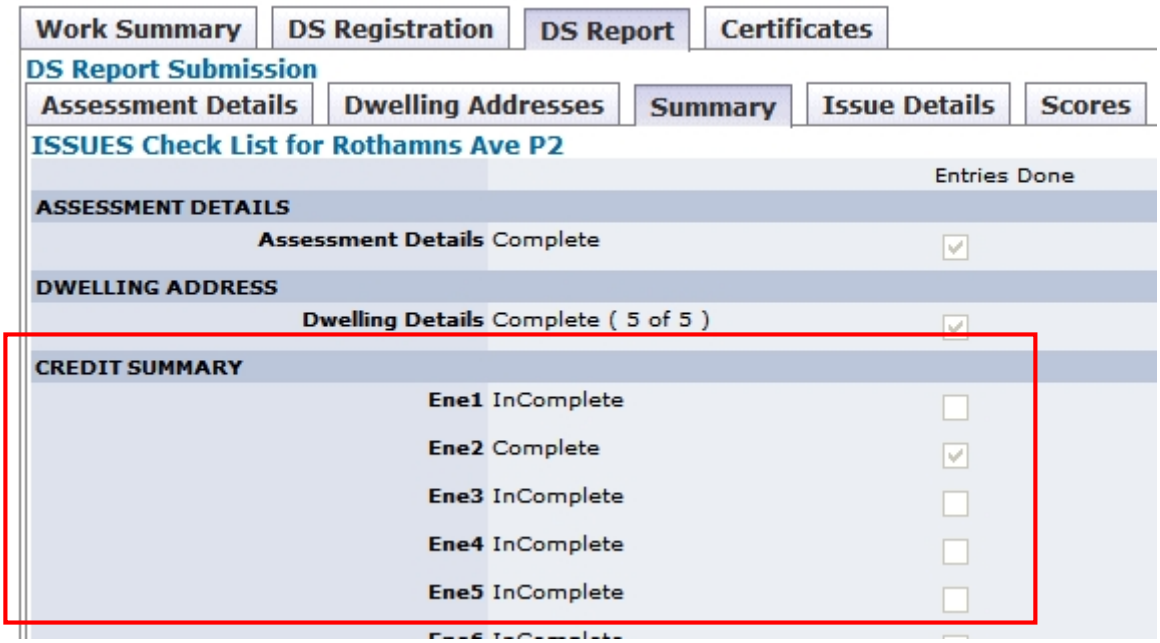
11.4 The credit summary



- The final section of the issues check list shows the credit summary, and the status of each of the 34 issues which make up the Code for Sustainable Homes.
- The status of each issue under the credit summary relates directly to the **Completed** status of each issue, which is defined through the **Completed** tick box found at the bottom left of each individual issue detail screen:

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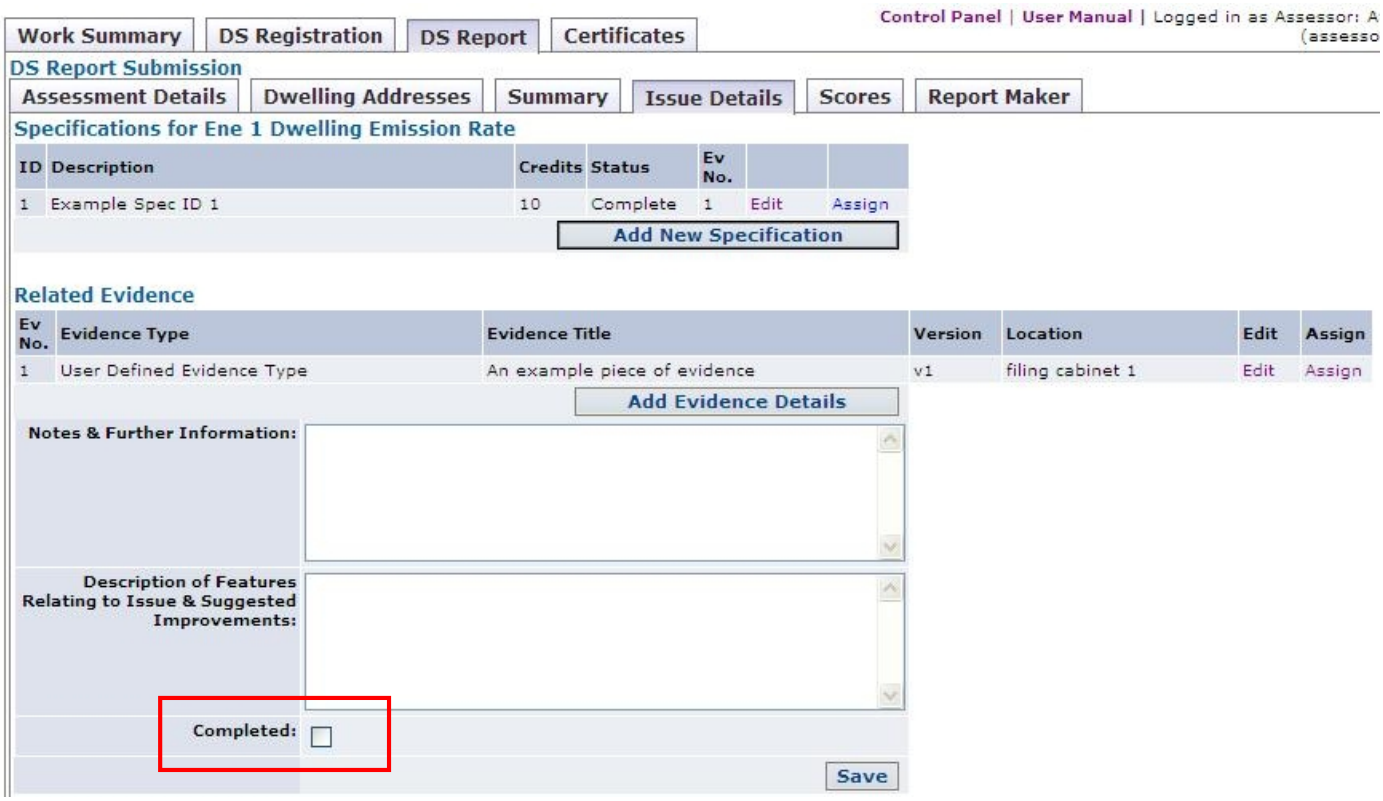
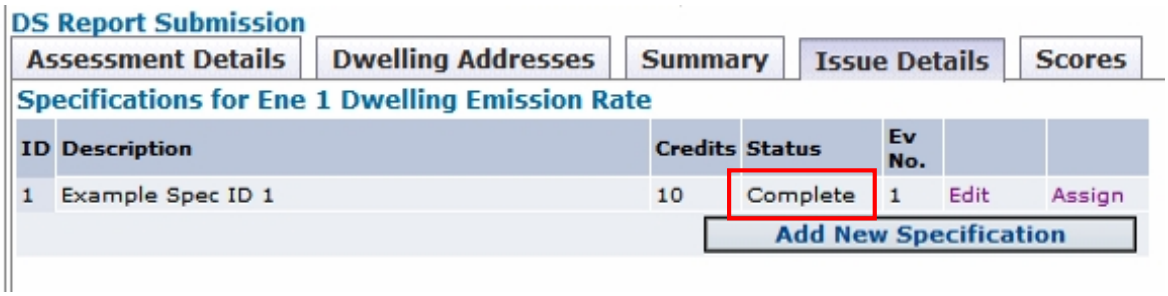

Work Summary
DS Registration
DS Report
Certificates
Control Panel | User Manual | Logged in as Assessor: A (assesso
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
Specifications for Ene 1 Dwelling Emission Rate
ID Description Credits Status Ev No.
1 Example Spec ID 1 10 Complete 1 Edit Assign
Add New Specification
Related Evidence
Ev No. Evidence Type Evidence Title Version Location Edit Assign
1 User Defined Evidence Type An example piece of evidence v1 filing cabinet 1 Edit Assign
Add Evidence Details
Notes & Further Information:
Description of Features Relating to Issue & Suggested Improvements:
Completed:
Save

- In order for each issue to be saved as 'Completed' on this form, the assessor must first ensure that all spec ID's have been saved as complete:



Please Note ! In cases where a development is not seeking a particular issue (or in other words 'credit not sought'), the issue detail should be saved as complete through this check box, without entering any spec ID's or evidence.

- The system will not allow the assessor to submit the report until all items under the issues check list are marked as complete, with a tick displayed in the corresponding 'Entries Done' column.

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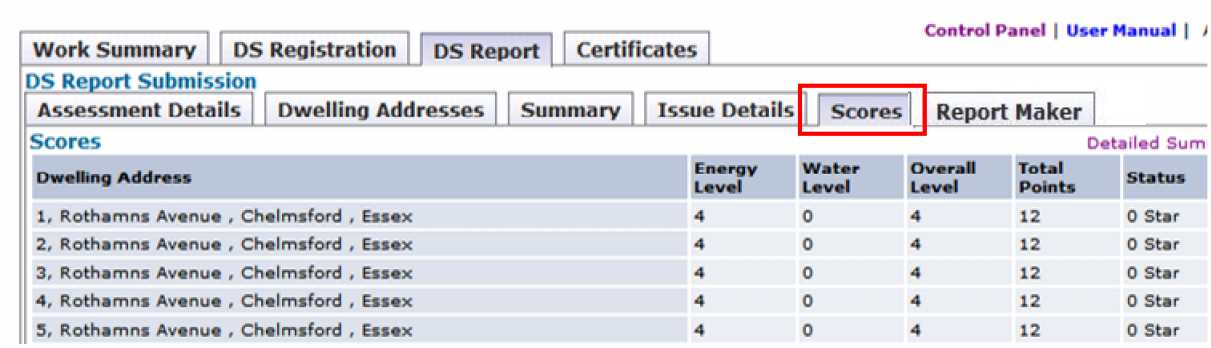
12 Viewing scores

12.1 The score summary

- At any stage in the submission process, the user is able to use the View Scores function to see at a glance, a summary of the score for each dwelling.
- To View Scores for dwellings;
- From the **Work Summary** page
- Click on the **Status** text for the assessment you wish to update.
- The **Assessment Details** page is displayed.
- Click on the **Scores** tab.
- The **Scores** page for the selected assessment is displayed.



Dwelling Address	Energy Level	Water Level	Overall Level	Total Points	Status
1, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
2, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
3, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
4, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
5, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star

- The columns indicate the mandatory level reached for the Energy and Water categories, the Overall Level, Total Points and Star Rating.

Please Note ! This page reflects only what has been recorded and assigned so far. Always check that the report is complete before taking the data displayed here as being final.

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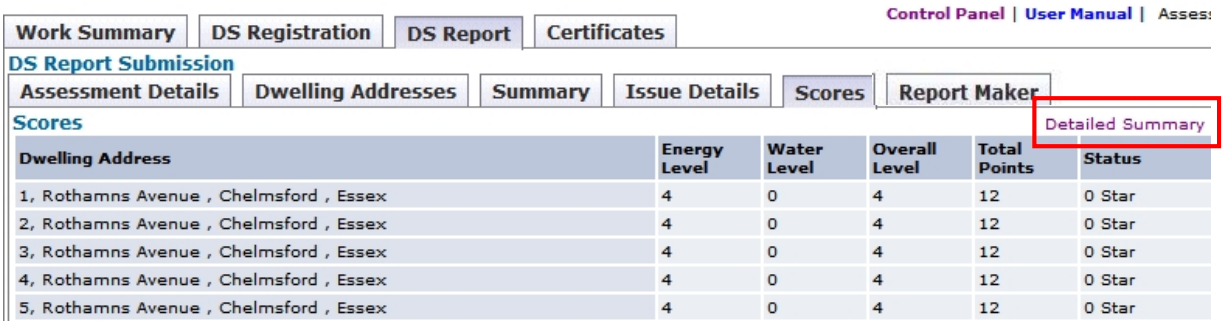
12.2 Detailed score summary

- This function provides a detailed summary of the scores broken down for categories and issues on a dwelling by dwelling basis.
- Click on the **Detailed Summary** text which is located above the dwelling list.



Dwelling Address	Energy Level	Water Level	Overall Level	Total Points	Status
1, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
2, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
3, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
4, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star
5, Rothamns Avenue , Chelmsford , Essex	4	0	4	12	0 Star

- A new window opens displaying the **Score Details** page.

Score Details for Rothamns Ave P2

PLOT NO	ENERGY									WATER		MATERIAL			SURFACE WATER		WASTE			POLL		HEALTH & WELLBEING				MANAGEMENT				ECOLOGY					SCORE SUMMARY					
	1	2	3	4	5	6	7	8	9	1	2	1	2	3	1	2	1	2	3	1	2	1	2	3	4	1	2	3	4	1	2	3	4	5	Ene Lvl	Wtr Lvl	M Req	Ovl Lvl	Ttl Pts	
1	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
2	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
3	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
4	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
5	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D

- Dwellings are identified by the plot number.
- At a glance you are able to view which issues have **completed Spec ID's** assigned to them (incomplete spec ID's will not show on this screen), the credits that have been awarded by assigned spec ID's, and the total number of points that this translates to.
- Mandatory levels achieved are indicated, along with the final Code Level score.

Score Details for Rothamns Ave P2

PLOT NO	ENERGY									WATER		MATERIAL			SURFACE WATER		WASTE			POLL		HEALTH & WELLBEING				MANAGEMENT				ECOLOGY					SCORE SUMMARY					
	1	2	3	4	5	6	7	8	9	1	2	1	2	3	1	2	1	2	3	1	2	1	2	3	4	1	2	3	4	1	2	3	4	5	Ene Lvl	Wtr Lvl	M Req	Ovl Lvl	Ttl Pts	
1	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
2	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
3	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
4	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D
5	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	No	4	12	D

Please Note ! The total points score awarded to a dwelling does not equate to the total number of credits awarded to that dwelling.
Please Note ! The M Req column is not applicable to November 2010 assessments.

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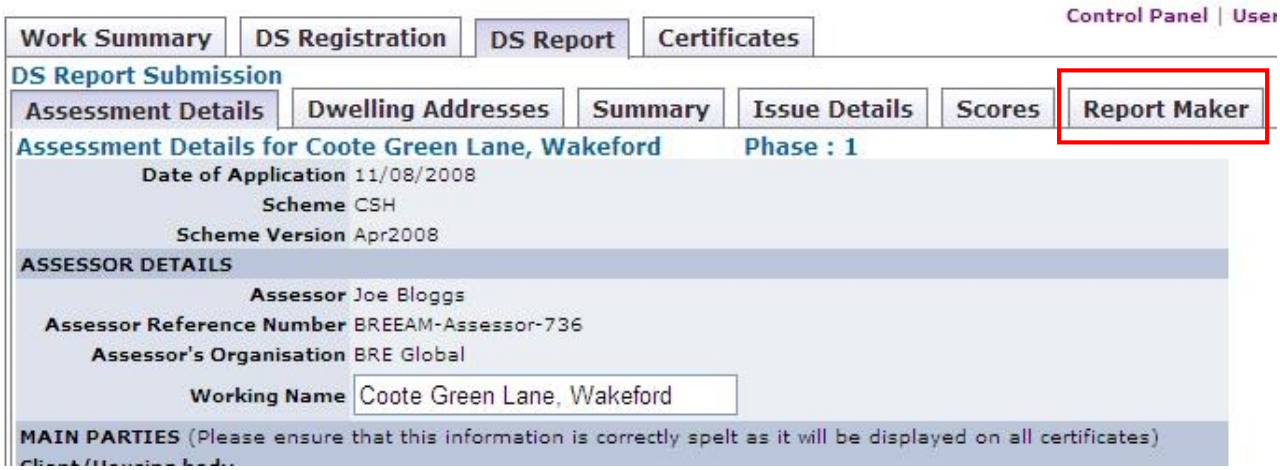
13 The Report Maker

- The **Report Maker** allows the generation of pre-defined reports on various aspects of an individual assessment. All reports are generated in PDF format, and can be saved locally and/ or printed.

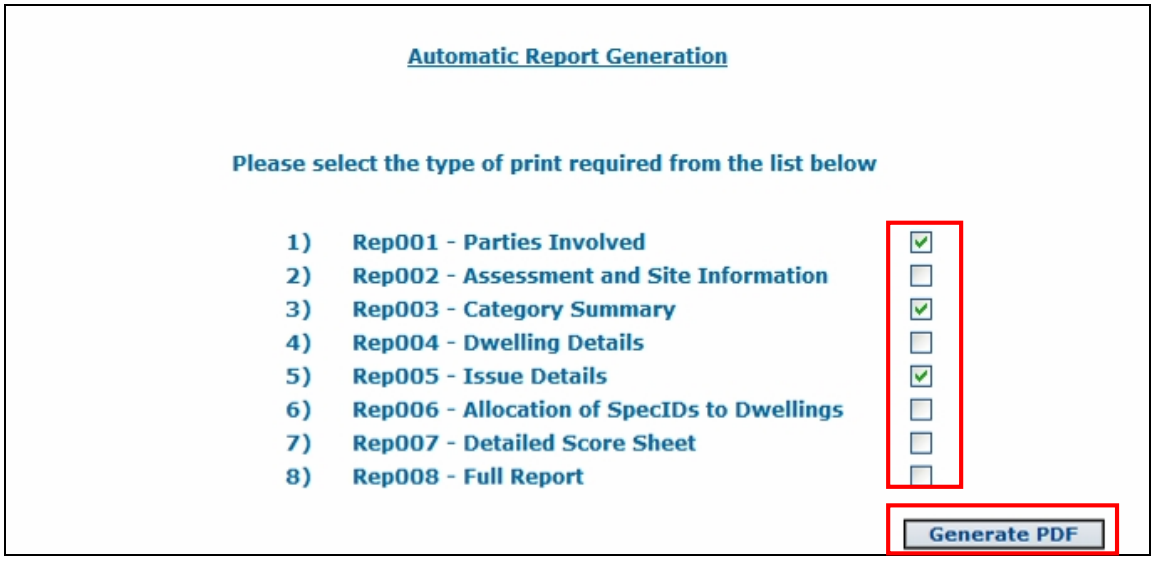
Please Note ! The **Report Maker** can be used at any time while an assessments status is **DS/ PC Assessing**. Once an assessment has been submitted (**DS/ PC Submitted**) the **Report Maker** cannot be used again until the assessment status is **DS/ PC Action Required**, or **DS/ PC Certified**.

13.1 Using the report maker for assessments with DS/ PC Assessing status

- From the **Work Summary** screen, open an individual assessment (with a status of **DS/ PC Assessing**) from the **Work Summary** Screen, and click on the **Report Maker** tab at the far right.



- Select the combination of reports you would like from the **Report Maker** menu, and click on the **Generate PDF** button.


Automatic Report Generation
Please select the type of print required from the list below
1) Rep001 - Parties Involved
2) Rep002 - Assessment and Site Information
3) Rep003 - Category Summary
4) Rep004 - Dwelling Details
5) Rep005 - Issue Details
6) Rep006 - Allocation of SpecIDs to Dwellings
7) Rep007 - Detailed Score Sheet
8) Rep008 - Full Report
Generate PDF

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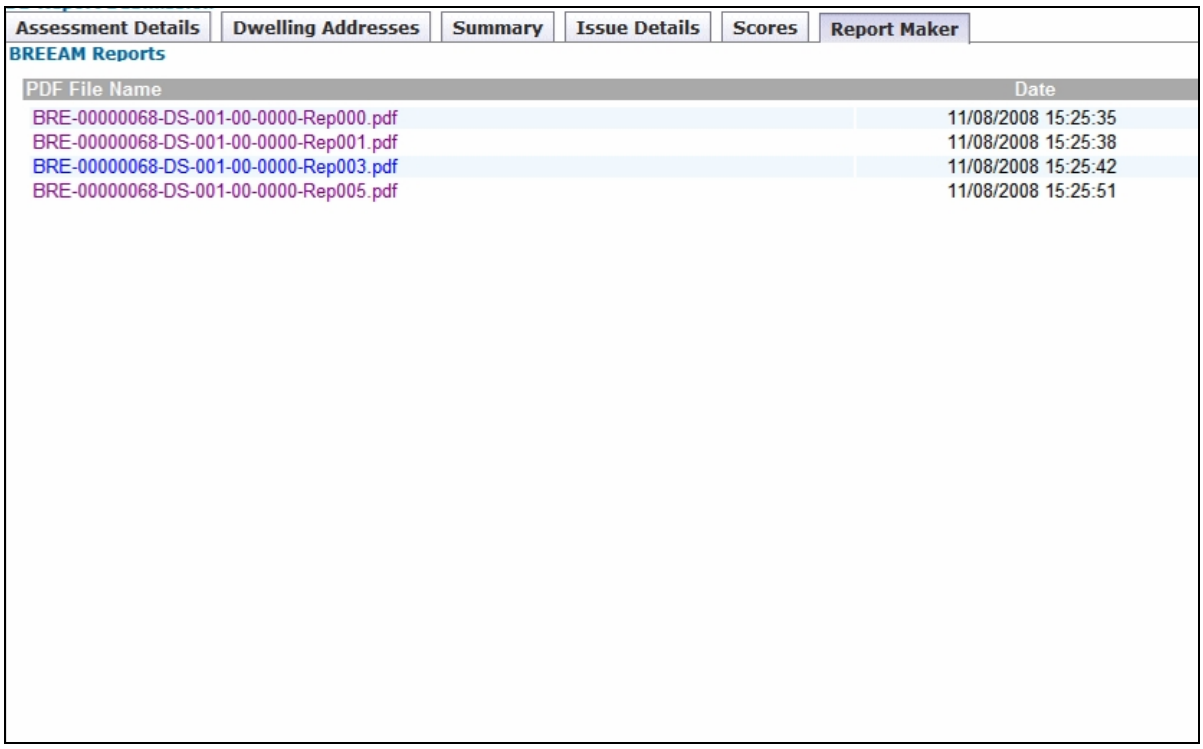
Please Note ! Option 8 (Rep008 – Full Report) combines the first 7 options into one report. The full report contains all vital information regarding an individual assessment; the intention is that it can be presented to clients and other assessment stakeholders. Option 8 will also output all 8 of the reports.

Please Note ! Generation of PDF reports may take up to several minutes depending on current system usage, local connection speed and other factors. If a time out screen is presented, please hit the **back button** on the browser, and press the **Generate PDF** button again.

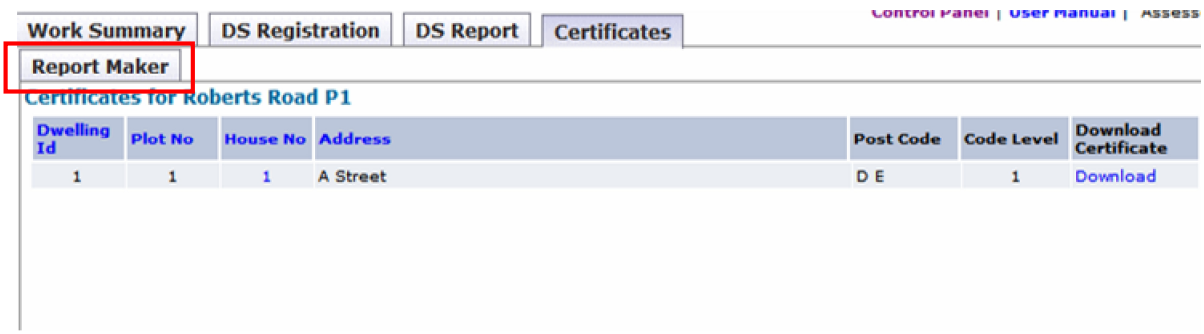
Please Note ! If a printed copy of the report is required, then for best results use a colour printer.

- The requested reports will appear as a list of final names. Each report can be opened, saved and printed as required.



13.2 Using the report maker for assessments with DS/ PC Certified status

- From the **Work Summary** screen, click on the **DS/ PC Certified** status heading
- Following this, click on the **Report Maker** tab, located under the **Work Summary** tab.



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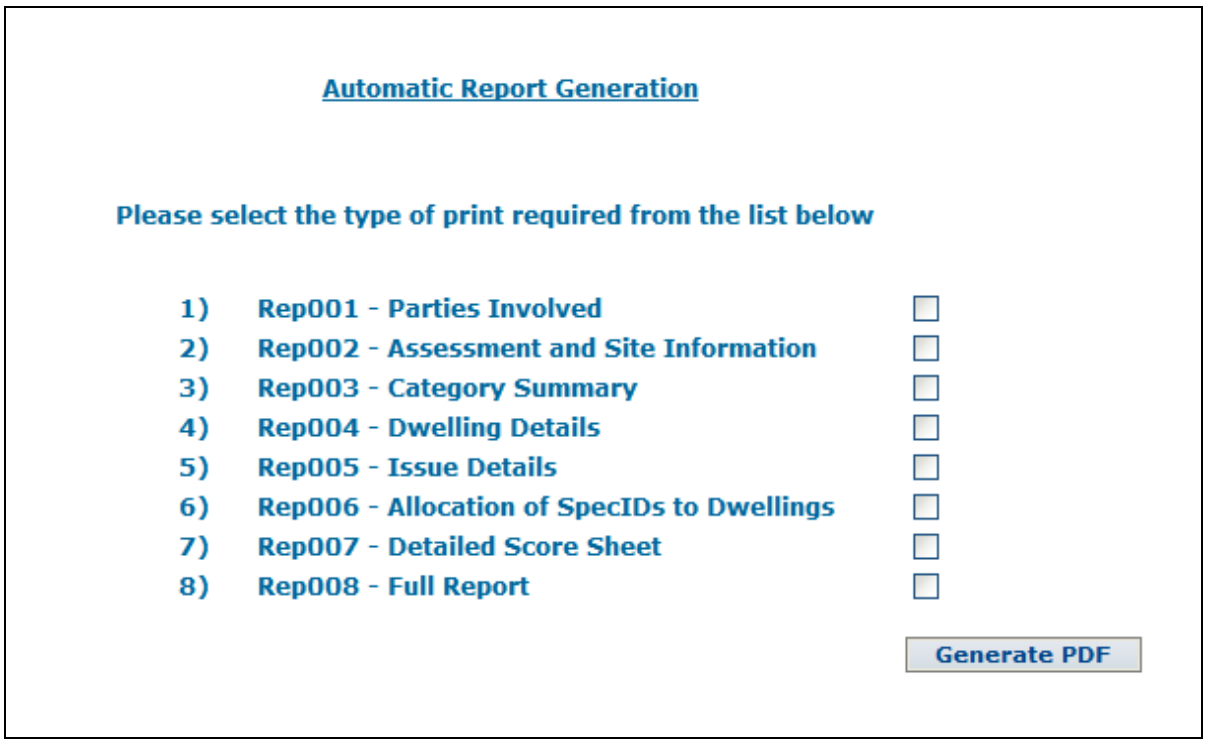
- The user is then presented with the same Report Maker menu screen;


Automatic Report Generation
Please select the type of print required from the list below
1) Rep001 - Parties Involved
2) Rep002 - Assessment and Site Information
3) Rep003 - Category Summary
4) Rep004 - Dwelling Details
5) Rep005 - Issue Details
6) Rep006 - Allocation of SpecIDs to Dwellings
7) Rep007 - Detailed Score Sheet
8) Rep008 - Full Report
Generate PDF

13.3 Importing corporate logos

- Users may upload their own corporate logo onto the **Report Maker,** so that it is incorporated into all generated reports.

- To add a corporate logo, click on the **Work Summary** tab, and click on the **Control Panel** link;

Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing

- Once the control panel is displayed, click on the **Edit** button, on the **My Registration Details** section.

- At the bottom of the **Registered Users – Profile Update** page, there is a field labelled **Upload Logo;**

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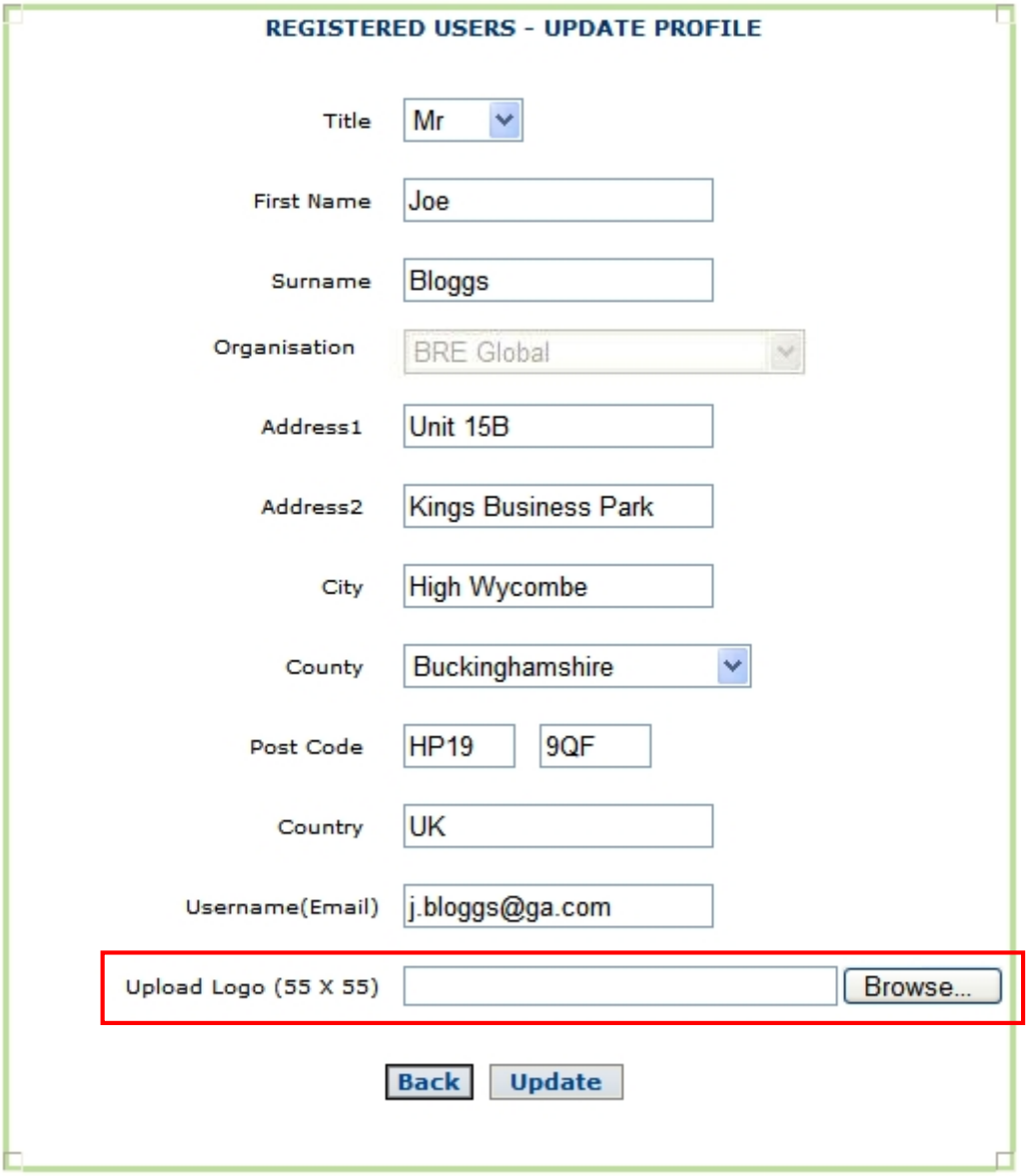

- Click on browse button, and click on the file you wish to upload from the appropriate local directory
- Click on the **Update** button to add this logo to the system.
- If the file is successfully uploaded, a message will be displayed at the bottom of the **Registered Users – Profile Update** page;

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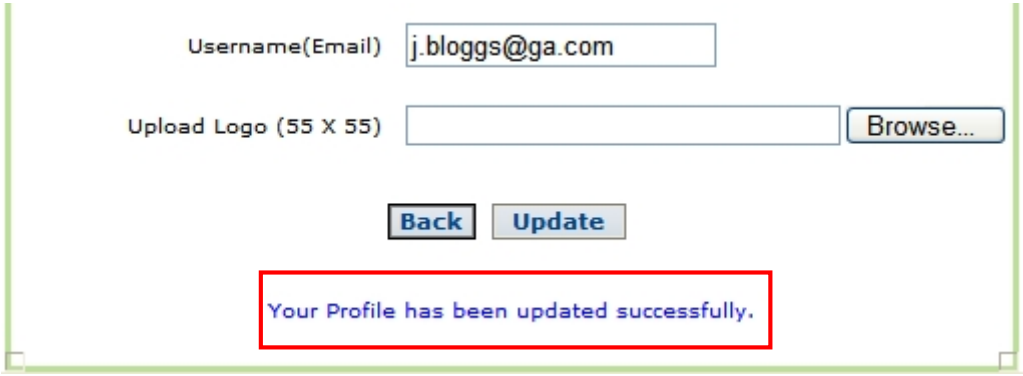

Please Note ! Only files that are in **gif**, **jpg** or **png** format will be successfully uploaded.

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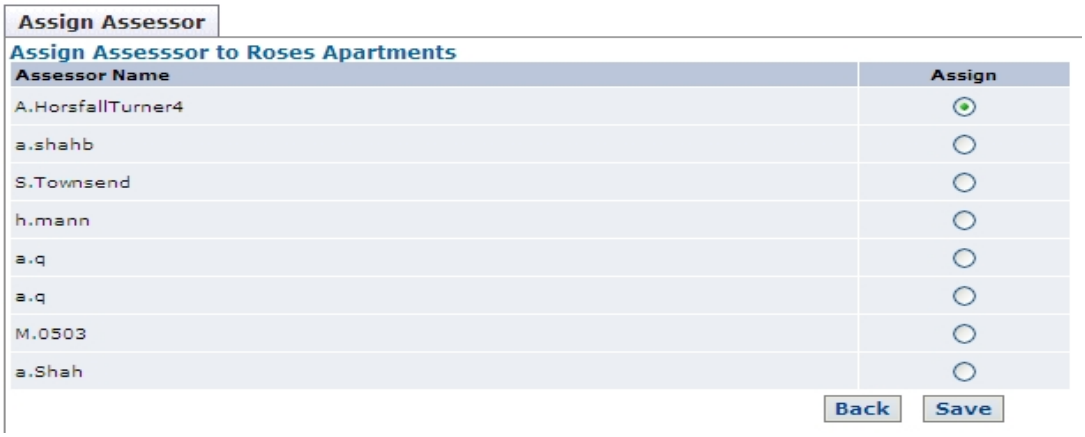
14 Re-assigning assessments

- It is possible to re-assign an assessment to another assessor within your company.
- From the **Work Summary** page,
- Click on the small blue plus (+) symbol in the far right column of the assessment you wish to assign.

Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified +
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified +
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing +
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing +

- The **Assign Assessor** page is displayed



- Click the radio button that corresponds with the name of the assessor the assessment is to be assigned to.
- Click the **Save** button to save the changes.
- The **Work Summary** page is displayed, the assessment you have reassigned will no longer be displayed in your summary list. However, the assessment will appear in the work summary of the assessor you have re-assigned to.

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15 Report submission

- When full assessment details have been recorded, including all dwelling addresses, all Spec ID's and all evidence is referenced to justify the credits awarded for each issue, you should therefore perform the following checks;

15.1 Pre submission Quality Checks

- Check the **Assessment Details** for the report and ensure that all names, company names, dates, addresses, post codes, and summary information are complete and accurate.

Please Note ! Some of this information will be used on the certificate, therefore it is very important that this information is correct or the certificates will be published with incorrect information.

- Check all dwellings have been recorded.
- Check that all Spec ID's required have been recorded.
- Check that all evidence has been linked to appropriate spec ID's
- Check that all evidence is referenced correctly.
- Check that all relevant Spec ID's have been allocated to the dwellings.
- Check the report for completeness (see the Checking the Report chapter of this guide for more information on checking for completeness).
- Check final scores (see the View Scores chapter of this guide for further information on checking scores).
- Once you are satisfied that the report is complete and accurate you may submit it to BRE for quality assurance checks.

Please Note ! Failing to ensure that the report is complete and accurate with credits awarded correctly could result in unnecessary delays. Quality assurance will require clarification and or corrections to be made before certificates can be issued. Any inaccuracies in data may result in certificates being issued with inaccuracies.

15.2 Submitting the report

- From the **Work Summary** page
- Click on the **Status** text for the assessment you wish to update.
- The **Assessment Details** page is displayed.
- Click on the **Summary** tab
- The **Credit Summary** page for the selected assessment is displayed.
- Click the **Submit Report** button.

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Control Panel | User Manual | Assessor : Joe
Work Summary
DS Registration
DS Report
Certificates
DS Report Submission
Assessment Details
Dwelling Addresses
Summary
Issue Details
Scores
Report Maker
ISSUES for Coote Green Lane, Wakeford
Credit
No of Specs
No of Refs
No of dwellings assigned
QA Scores
Status
Ene 1 Dwelling Emission Rate 0 0 0 Incomplete Edit
Ene 2 Building Fabric 0 0 0 Incomplete Edit
Ene 3 Internal Lighting 0 0 0 Incomplete Edit
Ene 4 Drying Space 0 0 0 Incomplete Edit
Ene 5 Energy Labelled White Goods 0 0 0 Incomplete Edit
Ene 6 External Lighting 0 0 0 Incomplete Edit
Ene 7 Low or Zero Carbon (LZC) Technologies 0 0 0 Incomplete Edit
Ene 8 Cycle Storage 0 0 0 Incomplete Edit
Ene 9 Home Office 0 0 0 Incomplete Edit
Wat 1 Indoor Water Use 0 0 0 Incomplete Edit
Wat 2 External Water Use 0 0 0 Incomplete Edit
Mat 1 Environmental Impact of Materials 0 0 0 Incomplete Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements 0 0 0 Incomplete Edit
Mat 3 Responsible Sourcing of Materials - Finishing 0 0 0 Incomplete Edit
Sur 1 Management of Surface Water Run-off From Developments 0 0 0 Incomplete Edit
Sur 2 Flood Risk 0 0 0 Incomplete Edit
Was 1 Storage of Non-Recyclable Waste and Recyclable Household Waste 0 0 0 Incomplete Edit
Was 2 Construction Site Waste Management 0 0 0 Incomplete Edit
Was 3 Composting 0 0 0 Incomplete Edit
Check Report
Submit Report

- The **ISSUES Check List** page is displayed.

Please Note ! If there are any incomplete addresses or Spec ID's remaining, these will be displayed as 'Incomplete'. Any incomplete records must be saved as complete before report submission is possible.

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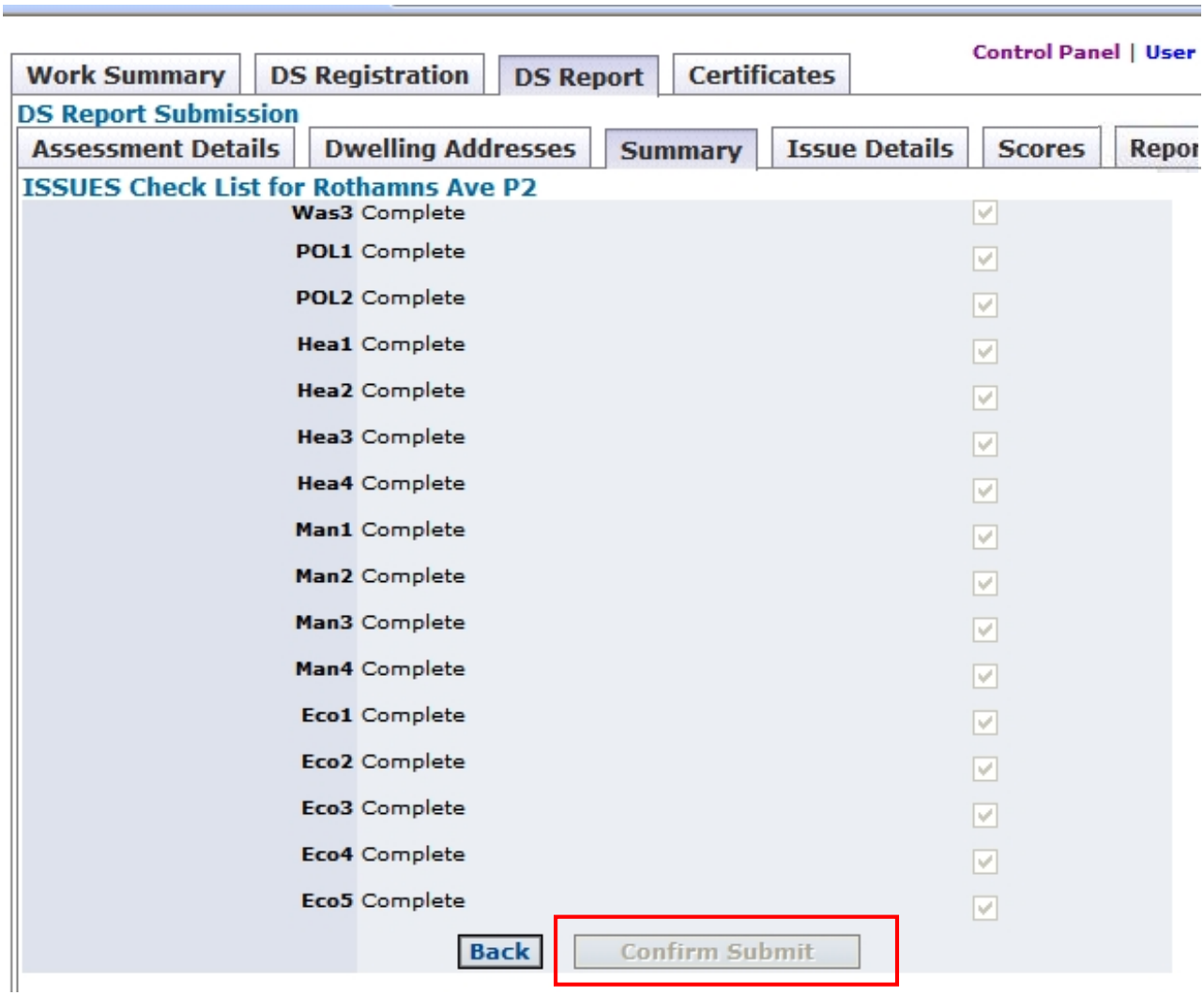
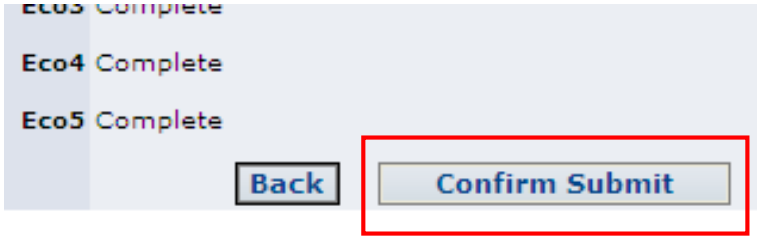
Please Note ! Whilst spec ID's, dwellings or issues remain as incomplete, the confirm submission button will remain greyed out.



- If all records are complete, scroll down to the bottom of the page and click the **Confirm Submit** button.



Please Note ! Please ensure that you do not have any outstanding work to do on the report before confirming submission as **after confirmation the report cannot be amended** or reassigned.

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- After submitting the report the **Work Summary** page is displayed. The assessment which has just been submitted to BRE is still visible in your work summary with the status **DS Submitted** and cannot be amended or reassigned.

Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Status		A
Beechwood Close, Newland Park	J.Bloggs	05/04/2008	BRE-00000558-DS-001-03	CSH	Oct2007	DS Passed (QA)		
Jersey Avenue Phase 1	J.Bloggs	01/06/2008	BRE-00001455-DS-001-02	CSH	Apr2008	DS Certified	+	☐
Evolution, Colwyn Bay	J.Bloggs	21/06/2008	BRE-00001589-PC-001-00	CSH	Apr2008	PCS Certified	+	☐
Jersey Avenue Phase 1	J.Bloggs	11/08/2008	BRE-00001904-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Coote Green Lane, Wakeford	J.Bloggs	11/08/2008	BRE-00001905-DS-001-00	CSH	Apr2008	DS Assessing	+	☐
Dictionary House	J.Bloggs	12/11/2008	BRE-00003050-DS-001-01	CSH	Oct2008	DS Checking (QA)		
American College, Chesterfield	J.Bloggs	29/01/2009	BRE-00003458-DS-001-01	CSH	Oct2008	DS Submitted		
Lavender Gardens, Newton Fairfiel	J.Bloggs	15/03/2009	BRE-00003790-DS-001-02	CSH	Oct2008	DS Action Required	+	

15.3 Report status

- The **Work Summary** page displays the progress of the report through the Quality Assurance process

- After submission the report will undergo Quality Assurance (QA) checks. Firstly an administrative check is performed to ensure all information required for certification is present, during this stage the report status will be displayed as **DS/ PCS Checking (Admin)** after admin checks it may be passed on for a credit check to ensure that all credits are awarded correctly, at this stage the status is displayed as **DS/ PCS Checking (QA)**.

- If there are no problems with the report the status of the report will change to **DS/ PCS Passed (QA).**

- Once the certificate has been generated the report status will change to **DS/ PCS Certified.**

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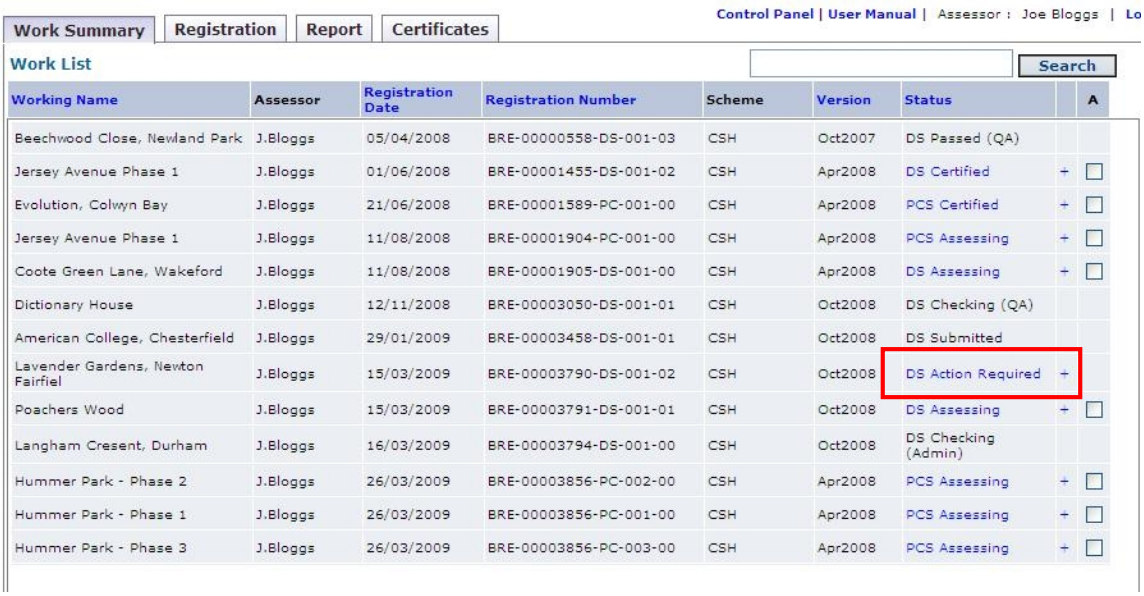
16 Managing reports which do not pass Quality Assurance checks

16.1 Reports that do not pass the QA admin check

- If the report does not pass the admin check the status changes to **DS/ PCS Action Required**.



Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Status		A
Beechwood Close, Newland Park	J.Bloggs	05/04/2008	BRE-00000558-DS-001-03	CSH	Oct2007	DS Passed (QA)		
Jersey Avenue Phase 1	J.Bloggs	01/06/2008	BRE-00001455-DS-001-02	CSH	Apr2008	DS Certified	+	☐
Evolution, Colwyn Bay	J.Bloggs	21/06/2008	BRE-00001589-PC-001-00	CSH	Apr2008	PCS Certified	+	☐
Jersey Avenue Phase 1	J.Bloggs	11/08/2008	BRE-00001904-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Coote Green Lane, Wakeford	J.Bloggs	11/08/2008	BRE-00001905-DS-001-00	CSH	Apr2008	DS Assessing	+	☐
Dictionary House	J.Bloggs	12/11/2008	BRE-00003050-DS-001-01	CSH	Oct2008	DS Checking (QA)		
American College, Chesterfield	J.Bloggs	29/01/2009	BRE-00003458-DS-001-01	CSH	Oct2008	DS Submitted		
Lavender Gardens, Newton Fairfiel	J.Bloggs	15/03/2009	BRE-00003790-DS-001-02	CSH	Oct2008	DS Action Required	+	
Poachers Wood	J.Bloggs	15/03/2009	BRE-00003791-DS-001-01	CSH	Oct2008	DS Assessing	+	☐
Langham Cresent, Durham	J.Bloggs	16/03/2009	BRE-00003794-DS-001-00	CSH	Oct2008	DS Checking (Admin)		
Hummer Park - Phase 2	J.Bloggs	26/03/2009	BRE-00003856-PC-002-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 1	J.Bloggs	26/03/2009	BRE-00003856-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 3	J.Bloggs	26/03/2009	BRE-00003856-PC-003-00	CSH	Apr2008	PCS Assessing	+	☐

- There are two areas of the assessment that may have failed the QA admin check, the **Assessment Details** form, and/ or individual dwellings from the **Dwelling Addresses** tab.

- In the case of both areas, the admin checker will have emailed you some comments in order for you to see what action is required before the report can be passed for a technical QA check.

Please Note ! The Assessment Details form, and each Dwelling Address are verified during the admin check. Please check these areas should a report be failed during an admin check.

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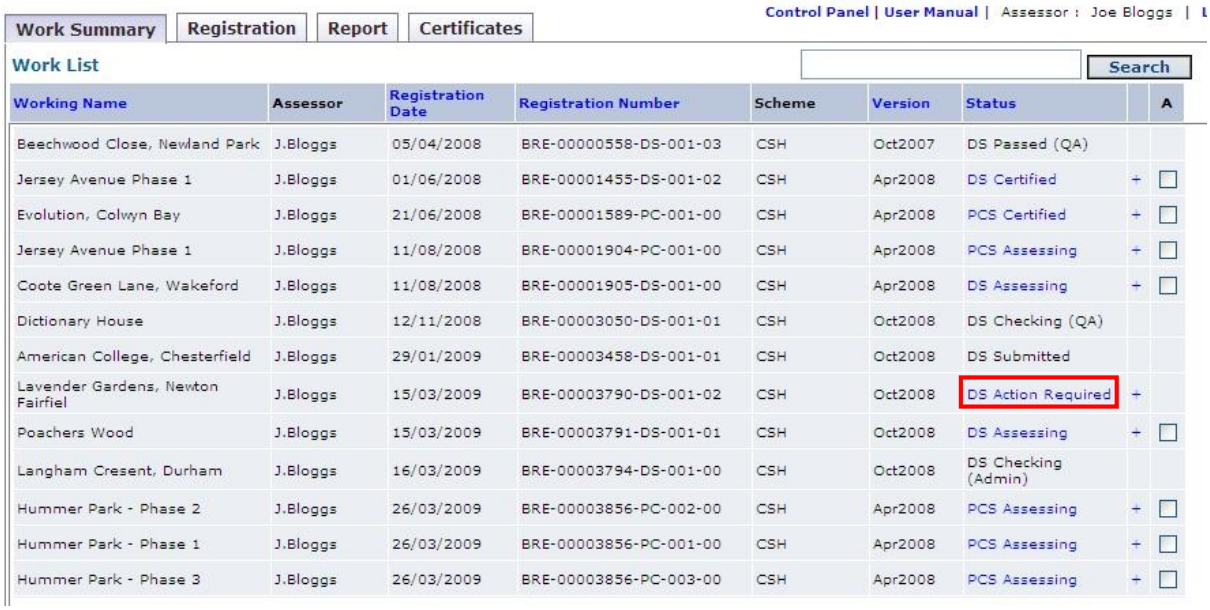
16.1.1

16.2 Report does not pass the QA check

- If the report does not pass the credit check the status changes to **DS/ PCS Action Required**.



Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Status		A
Beechwood Close, Newland Park	J.Bloggs	05/04/2008	BRE-00000558-DS-001-03	CSH	Oct2007	DS Passed (QA)		
Jersey Avenue Phase 1	J.Bloggs	01/06/2008	BRE-00001455-DS-001-02	CSH	Apr2008	DS Certified	+	☐
Evolution, Colwyn Bay	J.Bloggs	21/06/2008	BRE-00001589-PC-001-00	CSH	Apr2008	PCS Certified	+	☐
Jersey Avenue Phase 1	J.Bloggs	11/08/2008	BRE-00001904-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Coote Green Lane, Wakeford	J.Bloggs	11/08/2008	BRE-00001905-DS-001-00	CSH	Apr2008	DS Assessing	+	☐
Dictionary House	J.Bloggs	12/11/2008	BRE-00003050-DS-001-01	CSH	Oct2008	DS Checking (QA)		
American College, Chesterfield	J.Bloggs	29/01/2009	BRE-00003458-DS-001-01	CSH	Oct2008	DS Submitted		
Lavender Gardens, Newton Fairfiel	J.Bloggs	15/03/2009	BRE-00003790-DS-001-02	CSH	Oct2008	DS Action Required	+	
Poachers Wood	J.Bloggs	15/03/2009	BRE-00003791-DS-001-01	CSH	Oct2008	DS Assessing	+	☐
Langham Cresent, Durham	J.Bloggs	16/03/2009	BRE-00003794-DS-001-00	CSH	Oct2008	DS Checking (Admin)		
Hummer Park - Phase 2	J.Bloggs	26/03/2009	BRE-00003856-PC-002-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 1	J.Bloggs	26/03/2009	BRE-00003856-PC-001-00	CSH	Apr2008	PCS Assessing	+	☐
Hummer Park - Phase 3	J.Bloggs	26/03/2009	BRE-00003856-PC-003-00	CSH	Apr2008	PCS Assessing	+	☐

- An assessment failure at QA credit check will be associated with spec ID or evidence errors.
- The QA checker will have emailed you a **separate feedback form** in order for you to see what action is required before the report can be passed for certification.
- To view the QA Scores, click on the **DS/ PCS Action Required** status text
- The **Assessment Details** page is displayed.
- Click on the **Summary** tab, the issue summary page will be displayed;

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Credit	No of Specs	No of Refs	No of dwellings assigned	QA Scores	Status	
Ene 1 Dwelling Emission Rate	0	7	2	Red	Incomplete	Edit
Ene 2 Building Fabric	2	4	2	No Mark	Complete	Edit
Ene 3 Internal Lighting	1	2	2	No Mark	Complete	Edit
Ene 4 Drying Space	1	1	2	No Mark	Complete	Edit
Ene 5 Energy Labelled White Goods	0	1	2	Red	Incomplete	Edit
Ene 6 External Lighting	1	1	2	No Mark	Complete	Edit
Ene 7 Low or Zero Carbon (LZC) Technologies	3	7	2	No Mark	Complete	Edit
Ene 8 Cycle Storage	0	3	2	Red	Incomplete	Edit
Ene 9 Home Office	1	2	2	No Mark	Complete	Edit
Wat 1 Indoor Water Use	0	1	2	Red	Incomplete	Edit
Wat 2 External Water Use	1	2	2	No Mark	Complete	Edit
Mat 1 Environmental Impact of Materials	1	3	2	No Mark	Complete	Edit
Mat 2 Responsible Sourcing of Materials - Basic Building Elements	1	5	2	No Mark	Complete	Edit
Mat 3 Responsible Sourcing of Materials - Finishing	0	0	0		Complete	Edit
Sur 1 Management of Surface Water Run-off From Developments	1	3	2	No Mark	Complete	Edit
Sur 2 Flood Risk	1	4	2	No Mark	Complete	Edit

- The **QA Scores** column displays the mark each issue has been awarded by the QA checker. There are 3 marks, no mark, amber and red. Issues with a mark of amber may require correction; issues with red will require correction. Please see the assessor operations manual for further detail around QA credit check scores.

Please Note ! Issues that require re-work will be indicated by the incomplete status against the relevant issue, on the Issue Summary Screen.

- The provided QA feedback form will guide you as to what changes need to be made, e.g. if credits for a particular issue have been awarded without sufficient supporting evidence, the QA feedback will direct you to the issues which require amendment.

16.3 Resubmitting the assessment

- Once all feedback provided by the QA credit checker, in a separate form, has been addressed in all appropriate sections of the assessment, the same process of checking the assessment should be followed to activate the **Submit Report** button, found on the **Check Report** screen.

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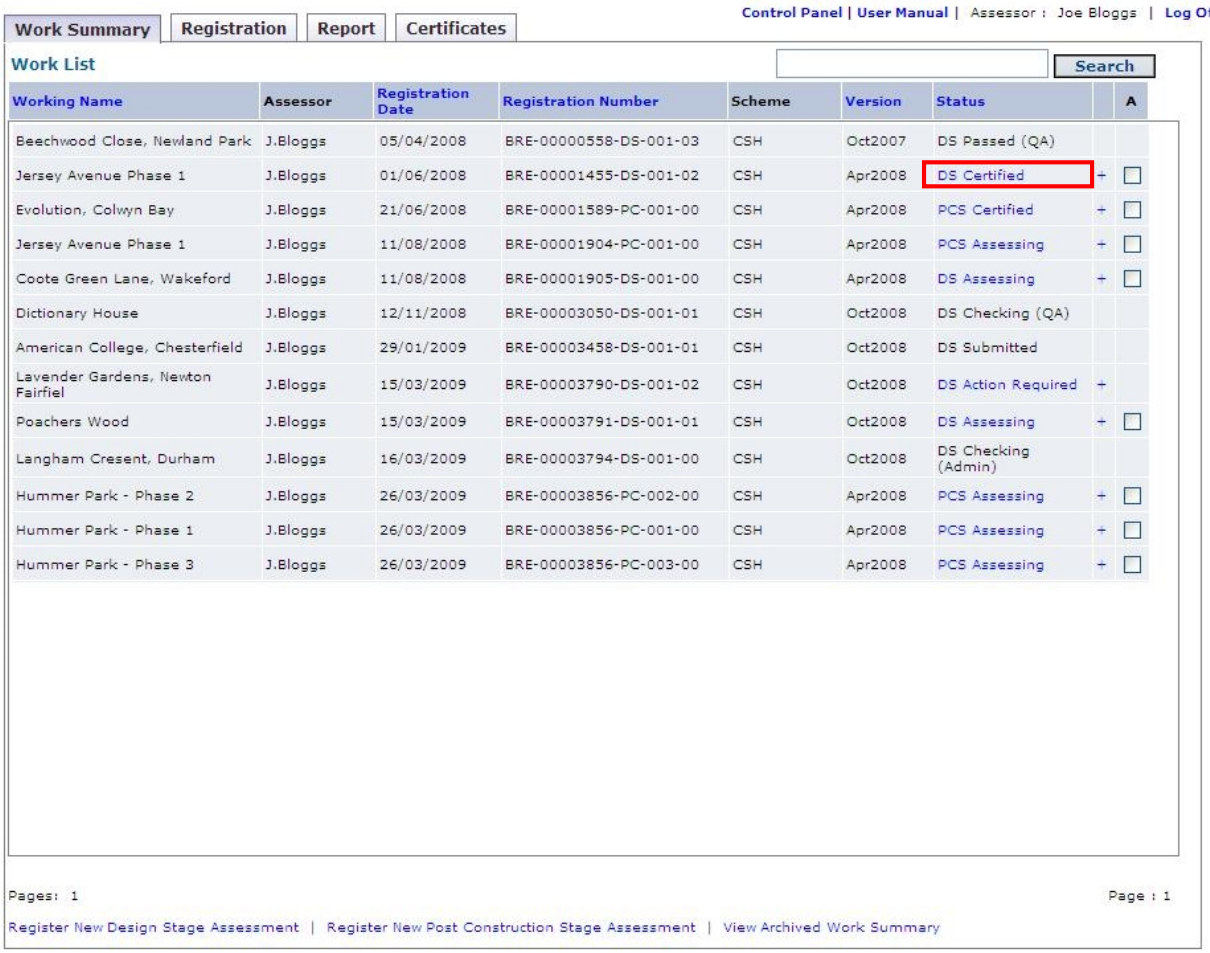
17 Managing certificates

- Once the Interim certificate has been generated the report status will change to **DS Certified**.


Control Panel | User Manual | Assessor : Joe Bloggs | Log Off
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing
Dictionary House J.Bloggs 12/11/2008 BRE-00003050-DS-001-01 CSH Oct2008 DS Checking (QA)
American College, Chesterfield J.Bloggs 29/01/2009 BRE-00003458-DS-001-01 CSH Oct2008 DS Submitted
Lavender Gardens, Newton Fairfiel J.Bloggs 15/03/2009 BRE-00003790-DS-001-02 CSH Oct2008 DS Action Required
Poachers Wood J.Bloggs 15/03/2009 BRE-00003791-DS-001-01 CSH Oct2008 DS Assessing
Langham Cresent, Durham J.Bloggs 16/03/2009 BRE-00003794-DS-001-00 CSH Oct2008 DS Checking (Admin)
Hummer Park - Phase 2 J.Bloggs 26/03/2009 BRE-00003856-PC-002-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 1 J.Bloggs 26/03/2009 BRE-00003856-PC-001-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 3 J.Bloggs 26/03/2009 BRE-00003856-PC-003-00 CSH Apr2008 PCS Assessing
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

17.1 Downloading certificates

- From the **Work Summary** page,
- Click on the report **Status** text.
- The Certificates page is displayed.

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Control Panel | User Manual | Assessor : Avnish

Work Summary | DS Registration | DS Report | Certificates

Certificates for P1, GCE grounds

Dwelling Id	Plot No	House No	Address	Post Code	Code Level	Download Certificate
1	24		New Millennium Avenue	MK22 3HG	4	Download
2	25		New Millennium Avenue	MK22 3HG	6	Download
3	26		New Millennium Avenue	MK22 3HG	6	Download
5	28		New Millennium Avenue	MK22 3HG	6	Download
6	29		New Millennium Avenue	MK22 3HG	6	Download
7	30		New Millennium Avenue	MK22 3HG	6	Download
8	31		New Millennium Avenue	MK22 3HG	6	Download
9	32		New Millennium Avenue	MK22 3HG	6	Download
10	33		New Millennium Avenue	MK22 3HG	6	Download
11	34		New Millennium Avenue	MK22 3HG	6	Download
12	35		New Millennium Avenue	MK22 3HG	6	Download
13	36		New Millennium Avenue	MK22 3HG	6	Download
14	37		New Millennium Avenue	MK22 3HG	6	Download
15	38		New Millennium Avenue	MK22 3HG	6	Download
16	39		New Millennium Avenue	MK22 3HG	6	Download
17	40		New Millennium Avenue	MK22 3HG	6	Download
18	-	1 Central House	Westmoreland Cresent	RL17 8FS	6	Download
19		2 Central House	Westmoreland Cresent	RL17 8FS	6	Download
20	.	3 Central House	Westmoreland Cresent	RL17 8FS	5	Download
21	_	4 Central House	Westmoreland Cresent	RL17 8FS	5	Download
36	14	14	Lavender Fields	TT8 6HG	1	Download

- From this page you are able to download certificates
- To download certificates for individual dwellings, click on the **Download** text on the row of the required dwelling.

Control Panel | User Manual | Assessor : Avnish

Work Summary | DS Registration | DS Report | Certificates

Certificates for P1, GCE grounds

Dwelling Id	Plot No	House No	Address	Post Code	Code Level	Download Certificate
1	24		New Millennium Avenue	MK22 3HG	4	Download
2	25		New Millennium Avenue	MK22 3HG	6	Download
3	26		New Millennium Avenue	MK22 3HG	6	Download
5	28		New Millennium Avenue	MK22 3HG	6	Download
6	29		New Millennium Avenue	MK22 3HG	6	Download
7	30		New Millennium Avenue	MK22 3HG	6	Download
8	31		New Millennium Avenue	MK22 3HG	6	Download
9	32		New Millennium Avenue	MK22 3HG	6	Download
10	33		New Millennium Avenue	MK22 3HG	6	Download
11	34		New Millennium Avenue	MK22 3HG	6	Download
12	35		New Millennium Avenue	MK22 3HG	6	Download
13	36		New Millennium Avenue	MK22 3HG	6	Download
14	37		New Millennium Avenue	MK22 3HG	6	Download

- In order to download multiple certificates at once you could use some form of download manager software. Download manager software can generally be found by carrying out an internet search with a search engine. Several are available free of charge and these allow selection (via highlighting) and downloading (usually via right clicking) of multiple files or links on a web page.

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18 Copying DS assessments to PCS

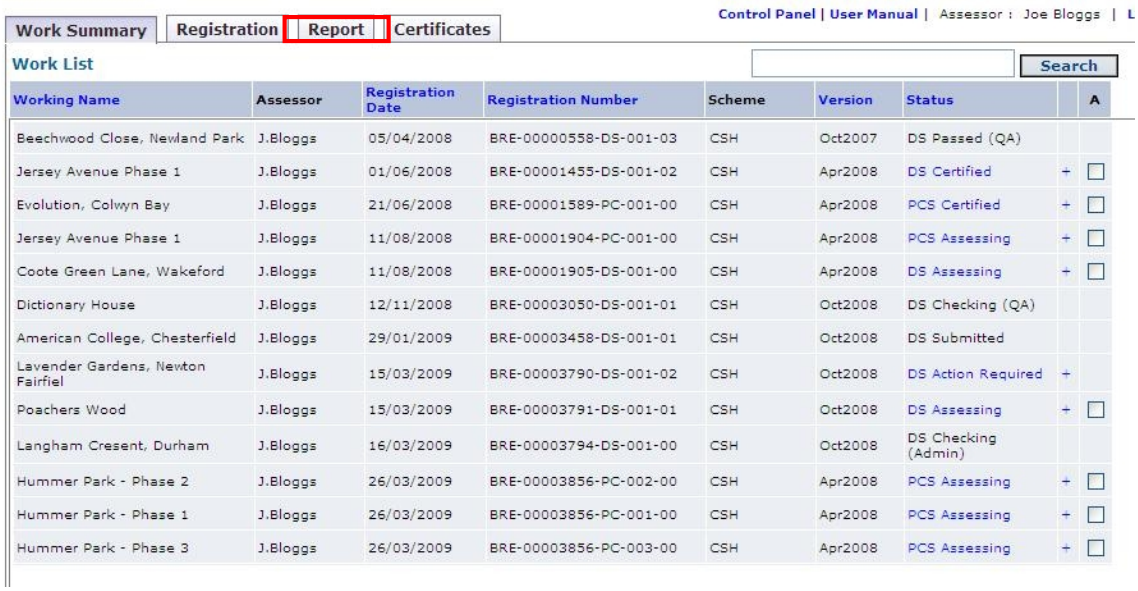
18.1 Copying 'Certified' DS assessments to PCS

- Once an assessment has been successfully certified (shown with a status of **DS Certified**), it can then be copied across to a PCS assessment. The copied PCS assessment will contain exactly the same Spec ID information as the completed DS assessment.

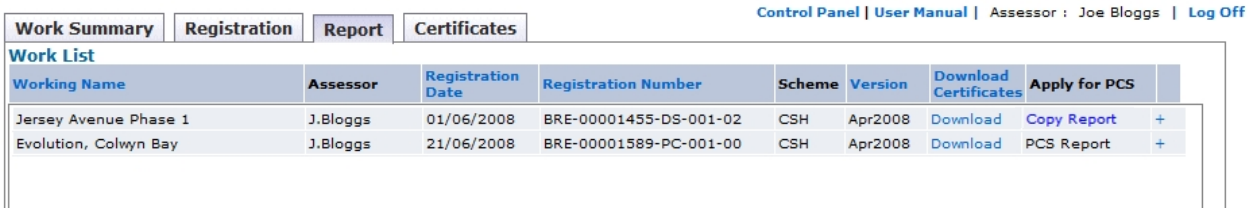
Please Note ! All individual dwelling address and spec ID records are copied across with a status of **Incomplete**.

Please Note ! Evidence is NOT copied across from DS to PCS since evidence requirements differ.

- To copy across a DS assessment to PCS, from the **Work Summary** tab, click on the **Report tab;**


Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | L
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Beechwood Close, Newland Park J.Bloggs 05/04/2008 BRE-00000558-DS-001-03 CSH Oct2007 DS Passed (QA)
Jersey Avenue Phase 1 J.Bloggs 01/06/2008 BRE-00001455-DS-001-02 CSH Apr2008 DS Certified
Evolution, Colwyn Bay J.Bloggs 21/06/2008 BRE-00001589-PC-001-00 CSH Apr2008 PCS Certified
Jersey Avenue Phase 1 J.Bloggs 11/08/2008 BRE-00001904-PC-001-00 CSH Apr2008 PCS Assessing
Coote Green Lane, Wakeford J.Bloggs 11/08/2008 BRE-00001905-DS-001-00 CSH Apr2008 DS Assessing
Dictionary House J.Bloggs 12/11/2008 BRE-00003050-DS-001-01 CSH Oct2008 DS Checking (QA)
American College, Chesterfield J.Bloggs 29/01/2009 BRE-00003458-DS-001-01 CSH Oct2008 DS Submitted
Lavender Gardens, Newton Fairfiel J.Bloggs 15/03/2009 BRE-00003790-DS-001-02 CSH Oct2008 DS Action Required
Poachers Wood J.Bloggs 15/03/2009 BRE-00003791-DS-001-01 CSH Oct2008 DS Assessing
Langham Cresent, Durham J.Bloggs 16/03/2009 BRE-00003794-DS-001-00 CSH Oct2008 DS Checking (Admin)
Hummer Park - Phase 2 J.Bloggs 26/03/2009 BRE-00003856-PC-002-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 1 J.Bloggs 26/03/2009 BRE-00003856-PC-001-00 CSH Apr2008 PCS Assessing
Hummer Park - Phase 3 J.Bloggs 26/03/2009 BRE-00003856-PC-003-00 CSH Apr2008 PCS Assessing

- The completed assessments screen will be displayed. This screen will show all assessments with a status of **DS** or **PCS Certified.**



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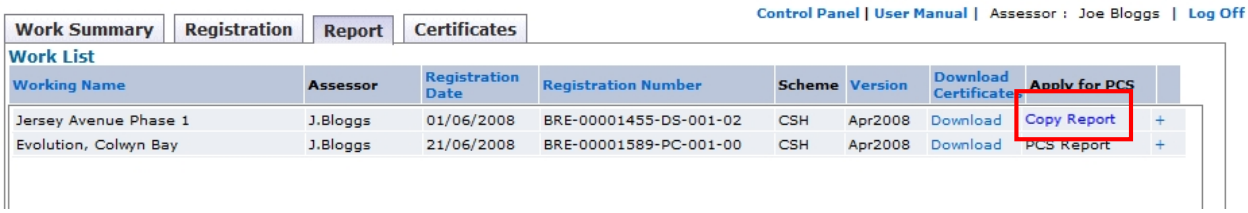
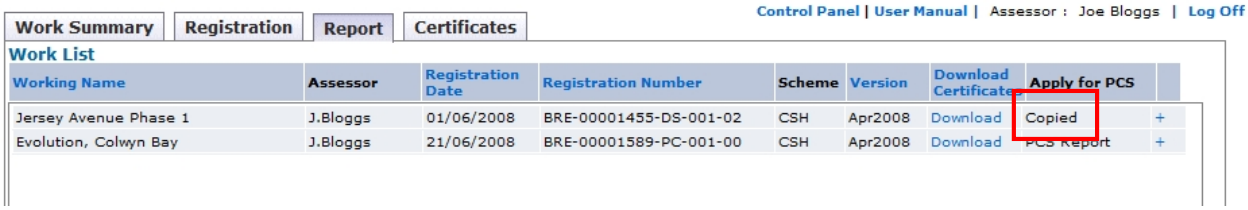
- To copy an assessment, click on the **Copy Report** heading under the **Apply for PCS** column on the appropriate assessment line.



- The heading will then change to **Copied.**



- On the **Work Summary** screen, the copied PCS assessment will appear.

Please Note ! Currently, certified DS assessments can only be copied across to PCS **ONCE**.

18.2 Copying 'Uncertified' DS assessments to PCS

- The system allows the user to copy an uncertified DS assessment (with a status of DSAssessing) to PCS if the status of the assessor logged in the system is '**lead assessor'** (please refer to page 4 for information on lead assessor functionality).

- The copied PCS assessment will contain exactly the same Spec ID information as the uncertified DS assessment.

Please Note ! All individual dwelling address and spec ID records are copied across with a status of **Incomplete**.

Please Note ! Evidence is NOT copied across from DS to PCS since evidence requirements differ.

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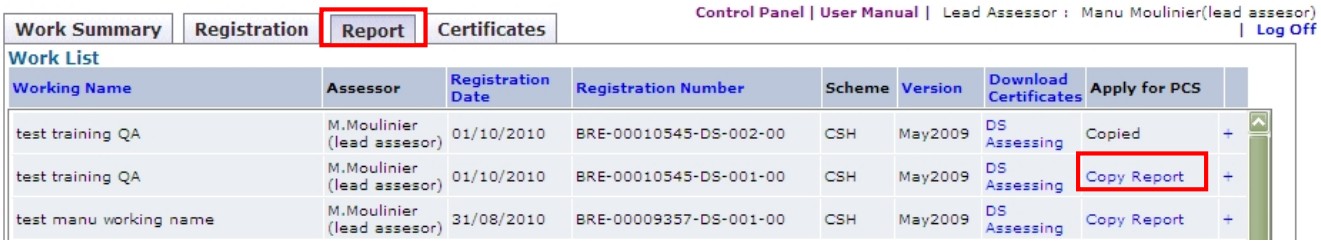
- To copy across a DS assessment to PCS, from the **Work Summary** tab, click on the **Report tab:**

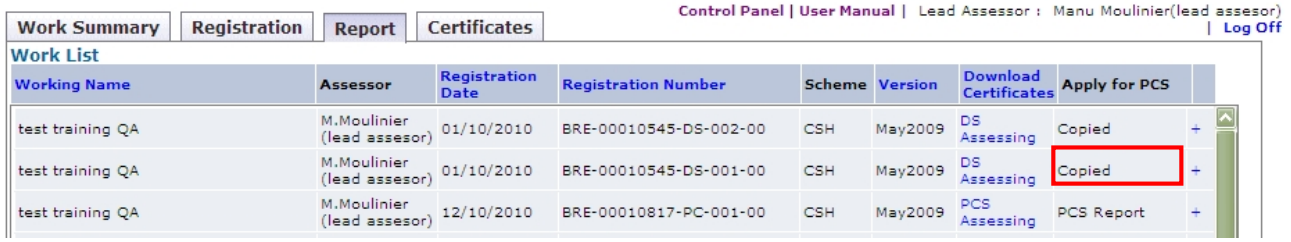
Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Download Certificates	Apply for PCS
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-002-00	CSH	May2009	DS Assessing	Copied
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-001-00	CSH	May2009	DS Assessing	Copy Report
test manu working name	M.Moulinier (lead assesor)	31/08/2010	BRE-00009357-DS-001-00	CSH	May2009	DS Assessing	Copy Report
test manu 24/08/2010	M.Moulinier (lead assesor)	24/08/2010	BRE-00009242-DS-001-00	CSH	May2009	DS Assessing	Copied
test manu 24/08/2010	M.Moulinier (lead assesor)	24/08/2010	BRE-00009243-PC-001-00	CSH	May2009	PCS Assessing	PCS Report
Test Manu 110610	M.Moulinier (lead assesor)	11/06/2010	BRE-00008399-DS-002-00	CSH	May2009	Download	Copy Report
Test Manu 110610	M.Moulinier (lead assesor)	11/06/2010	BRE-00008399-DS-001-00	CSH	May2009	DS Checking (Admin)	Copy Report

- To copy an assessment, click on the **Copy Report** heading under the **Apply for PCS** column on the appropriate assessment line.



Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Download Certificates	Apply for PCS
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-002-00	CSH	May2009	DS Assessing	Copied
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-001-00	CSH	May2009	DS Assessing	Copy Report
test manu working name	M.Moulinier (lead assesor)	31/08/2010	BRE-00009357-DS-001-00	CSH	May2009	DS Assessing	Copy Report

- The heading will then change to **Copied.**



Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Download Certificates	Apply for PCS
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-002-00	CSH	May2009	DS Assessing	Copied
test training QA	M.Moulinier (lead assesor)	01/10/2010	BRE-00010545-DS-001-00	CSH	May2009	DS Assessing	Copied
test training QA	M.Moulinier (lead assesor)	12/10/2010	BRE-00010817-PC-001-00	CSH	May2009	PCS Assessing	PCS Report

- On the **Work Summary** screen, the copied PCS assessment will appear.

Please Note ! Currently, certified DS assessments can only be copied across to PCS **ONCE**.

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19 Archiving

As assessors register more assessments on the system the Work Summary screen can become cluttered, this functionality allows the assessor to archive assessments and to reduce the number of assessments held in the Work Summary screen. Archived assessments can be simply retrieved at any time.

Step by step instructions

From the **Work Summary** screen, assessments can be moved to the assessors archive section, depending on the status of the assessment.

To archive an assessment tick the tick box under the column headed **A**, on the appropriate row for the assessment you wish to archive.

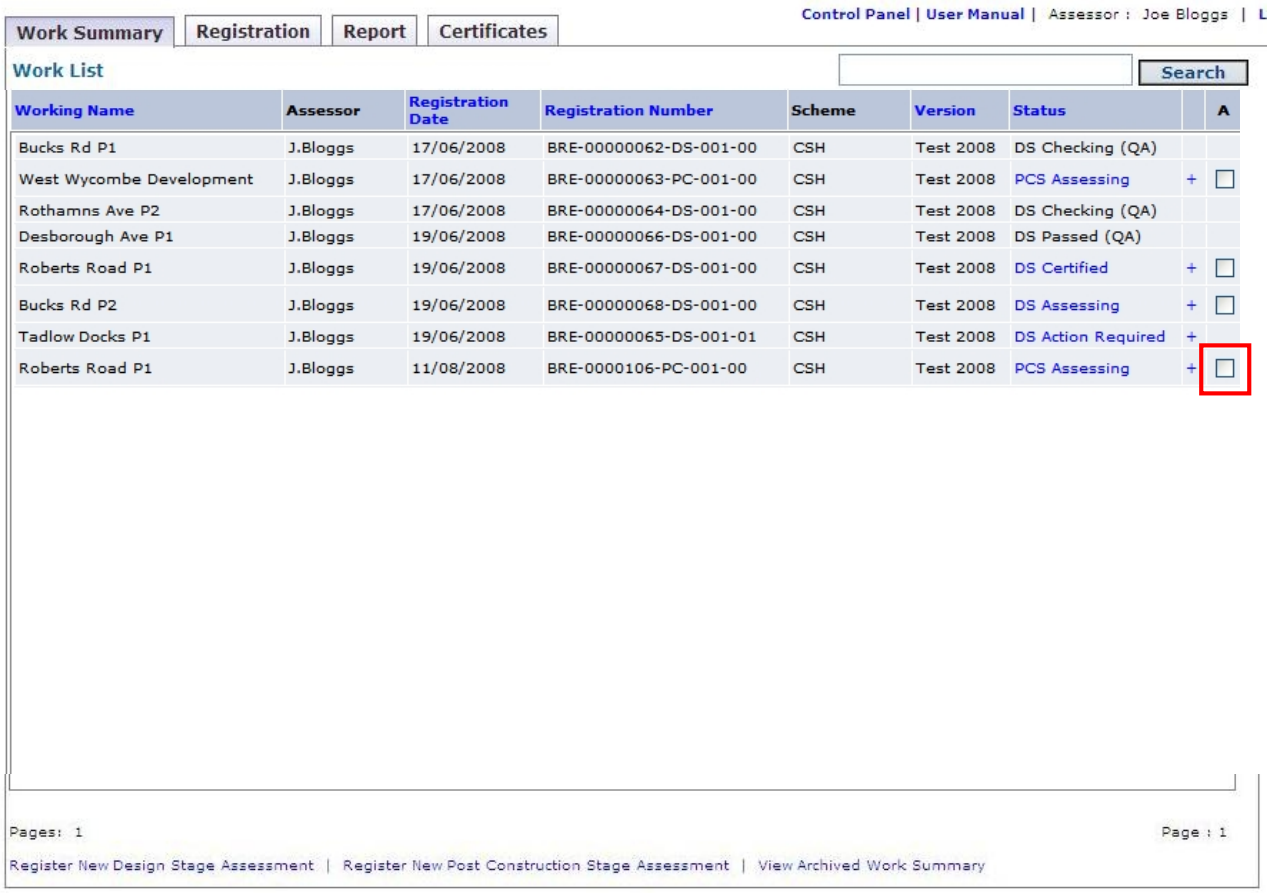
Control Panel | User Manual | Assessor : Joe Bloggs | L
Work Summary
Registration
Report
Certificates
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Bucks Rd P1 J.Bloggs 17/06/2008 BRE-00000062-DS-001-00 CSH Test 2008 DS Checking (QA)
West Wycombe Development J.Bloggs 17/06/2008 BRE-00000063-PC-001-00 CSH Test 2008 PCS Assessing +
Rothamns Ave P2 J.Bloggs 17/06/2008 BRE-00000064-DS-001-00 CSH Test 2008 DS Checking (QA)
Desborough Ave P1 J.Bloggs 19/06/2008 BRE-00000066-DS-001-00 CSH Test 2008 DS Passed (QA)
Roberts Road P1 J.Bloggs 19/06/2008 BRE-00000067-DS-001-00 CSH Test 2008 DS Certified +
Bucks Rd P2 J.Bloggs 19/06/2008 BRE-00000068-DS-001-00 CSH Test 2008 DS Assessing +
Tadlow Docks P1 J.Bloggs 19/06/2008 BRE-00000065-DS-001-01 CSH Test 2008 DS Action Required +
Roberts Road P1 J.Bloggs 11/08/2008 BRE-0000106-PC-001-00 CSH Test 2008 PCS Assessing +
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

Fig 1. Work Summary Screen

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Only assessments with the following status value can be archived:

- DS/ PCS Assessing
- DS/ PCS Certified

Assessments with any other status cannot be archived, as they are going through QA or certification processes. Where an amendment has been requested (e.g. certificate amendment or developer name amendment) the report must not be archived.

When the tick box for an assessment is ticked, the assessment is moved from the **Work Summary** screen, to the **Archive Work Summary** screen. In Figure 1, above, the assessment named “Roberts Road P1” was moved to the archive, Figure 2, below, shows that it has been moved to the archive.

In order to view the **Archived Work Summary** screen, the **View Archived Work Summary** link should be clicked, at the bottom of the **Work Summary** screen.

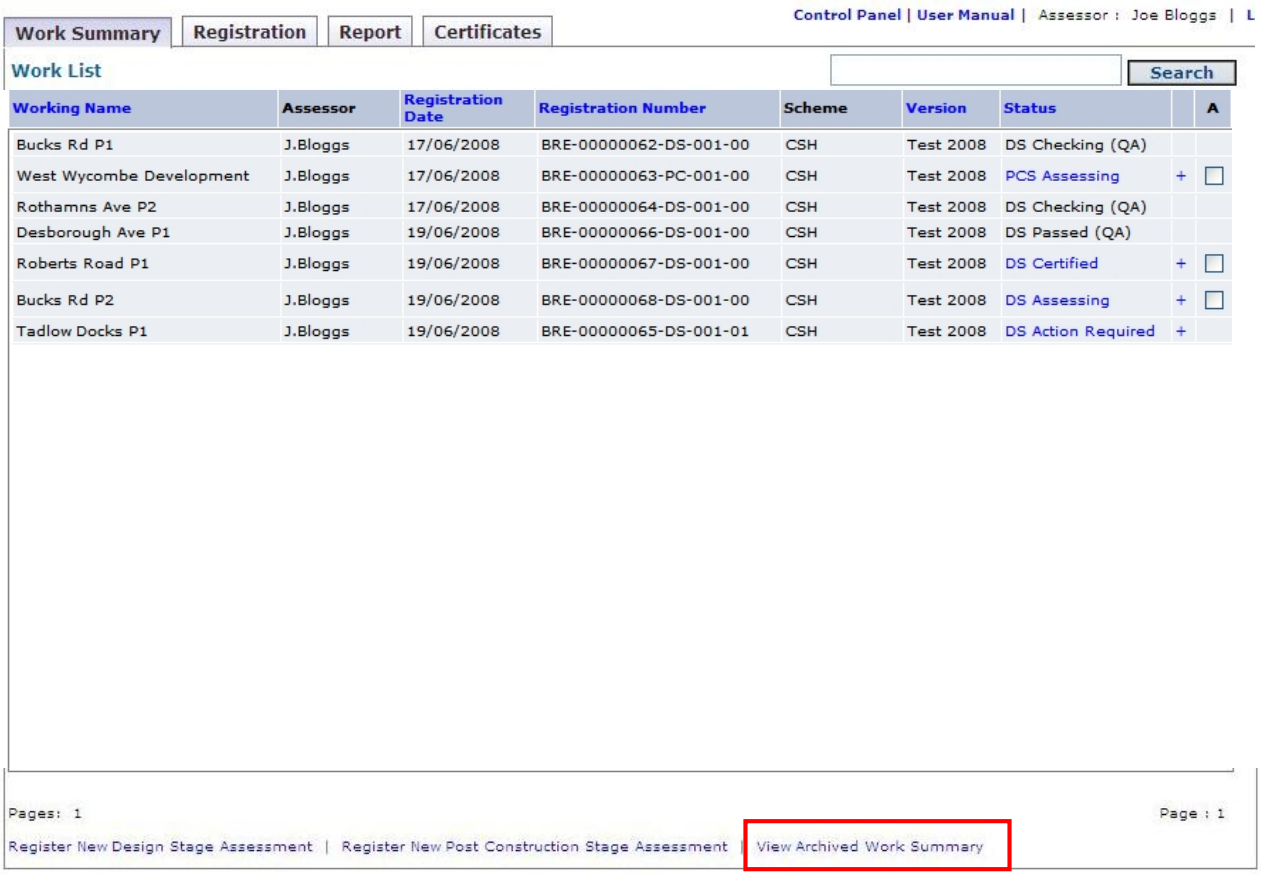
Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | L
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Bucks Rd P1 J.Bloggs 17/06/2008 BRE-00000062-DS-001-00 CSH Test 2008 DS Checking (QA)
West Wycombe Development J.Bloggs 17/06/2008 BRE-00000063-PC-001-00 CSH Test 2008 PCS Assessing +
Rothamns Ave P2 J.Bloggs 17/06/2008 BRE-00000064-DS-001-00 CSH Test 2008 DS Checking (QA)
Desborough Ave P1 J.Bloggs 19/06/2008 BRE-00000066-DS-001-00 CSH Test 2008 DS Passed (QA)
Roberts Road P1 J.Bloggs 19/06/2008 BRE-00000067-DS-001-00 CSH Test 2008 DS Certified +
Bucks Rd P2 J.Bloggs 19/06/2008 BRE-00000068-DS-001-00 CSH Test 2008 DS Assessing +
Tadlow Docks P1 J.Bloggs 19/06/2008 BRE-00000065-DS-001-01 CSH Test 2008 DS Action Required +
Pages: 1
Page : 1
Register New Design Stage Assessment | Register New Post Construction Stage Assessment | View Archived Work Summary

Fig 2. Work Summary Screen showing Roberts Road P1 assessment is no longer visible

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When the **View Archived Work Summary** link is selected, the users **Archived Work Summary** screen is displayed:

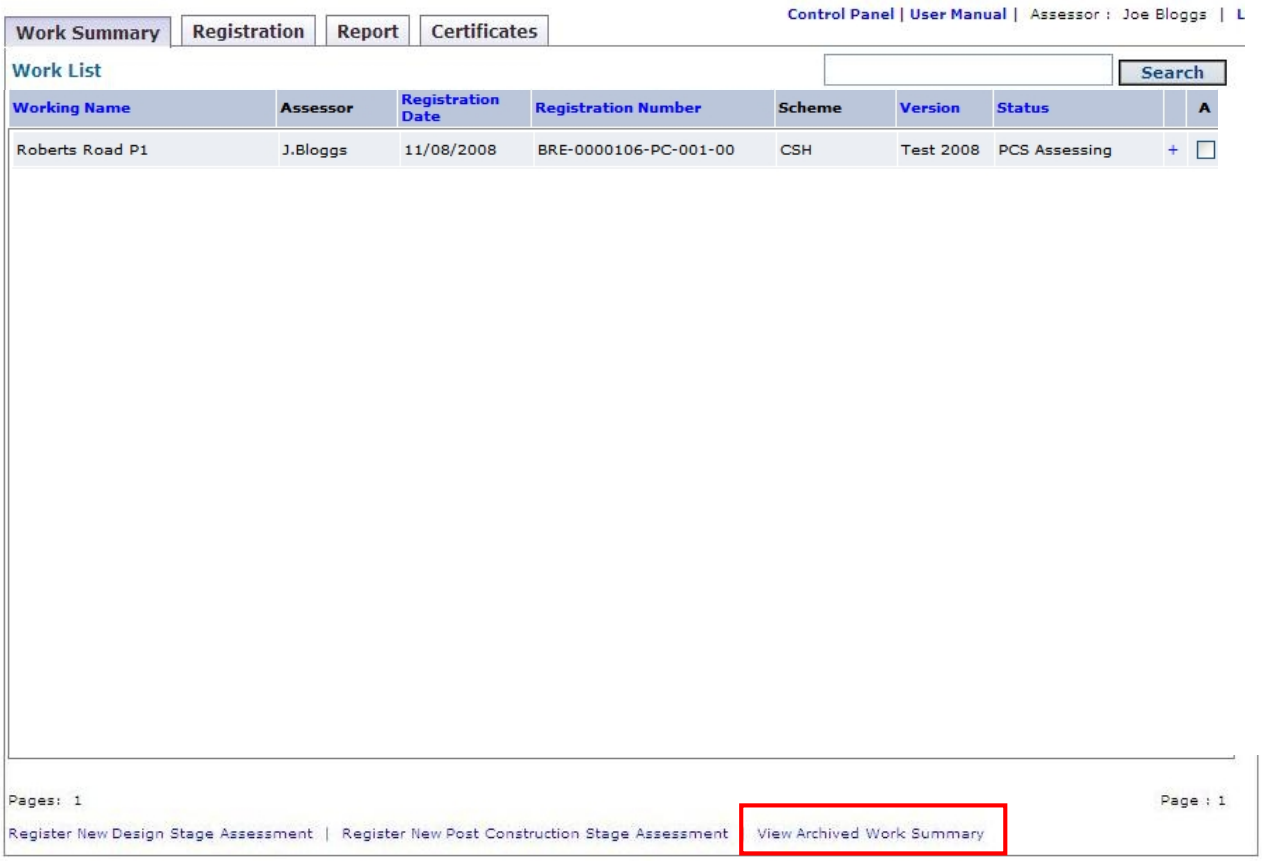

Fig 3. Archive Work Summary Screen

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Restoring to the Work Summary screen

By following the same process of ticking the tick box of the required assessment row, assessments can be moved from the **Archive Work Summary** screen, to the **Work Summary** Screen. Figure 4., below.

Fig 4. Archive Work summary Screen

In the Figure 5., below, the “Roberts Road P1” assessment has been restored to the **Work Summary** screen.

Work Summary
Registration
Report
Certificates
Control Panel | User Manual | Assessor : Joe Bloggs | L
Work List
Search
Working Name
Assessor
Registration Date
Registration Number
Scheme
Version
Status
A
Bucks Rd P1 J.Bloggs 17/06/2008 BRE-00000062-DS-001-00 CSH Test 2008 DS Checking (QA)
West Wycombe Development J.Bloggs 17/06/2008 BRE-00000063-PC-001-00 CSH Test 2008 PCS Assessing
Rothamns Ave P2 J.Bloggs 17/06/2008 BRE-00000064-DS-001-00 CSH Test 2008 DS Checking (QA)
Desborough Ave P1 J.Bloggs 19/06/2008 BRE-00000066-DS-001-00 CSH Test 2008 DS Passed (QA)
Roberts Road P1 J.Bloggs 19/06/2008 BRE-00000067-DS-001-00 CSH Test 2008 DS Certified
Bucks Rd P2 J.Bloggs 19/06/2008 BRE-00000068-DS-001-00 CSH Test 2008 DS Assessing
Tadlow Docks P1 J.Bloggs 19/06/2008 BRE-00000065-DS-001-01 CSH Test 2008 DS Action Required
Roberts Road P1 J.Bloggs 11/08/2008 BRE-0000106-PC-001-00 CSH Test 2008 PCS Assessing

Fig 5. Work summary Screen

 © BRE Global Ltd 2015

20 Phasing Assessments

Developments are often constructed and completed in phases, the assessor is now able to use a single assessment to create any number of assessment phases, this has the dual purpose of reflecting what is happening on site, allowing for certification to happen as appropriate and for the assessor to 'copy' assessment data such as Spec IDs and Evidence records from the master assessment to subsequent phases streamlining the process, saving time and the need to input duplicate information.

20.1 General system rules around phasing

Phasing can be carried out for both DS and PCS assessments.

Phasing **can only** be carried out on an assessment whilst the assessment has a status of DS or PCS Assessing.

Phasing **can only** be carried out from the master assessment (phase 001).
Phasing within an assessment will not be possible while an assessment has the following status values:

- DS/ PCS Submitted
- DS/ PCS Checking (Admin)
- DS/ PCS Checking (QA)
- DS/ PCS Action Required
- DS/ PCS Passed
- DS/ PCS Resubmitted
- DS/ PCS Certified

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20.2 Information copied during phasing

When an assessment is phased, the system will create the new phase of the assessment and copy across the following data from the original assessment to the new phase:

- Assessment Details
- Spec IDs
- Evidence
- Links between evidence and specIDs
- Links between specIDs and dwellings (only for the dwellings added to the new phase)

Therefore, if the Spec IDs and evidence are shared between phases, assessors are advised to phase an assessment when as much data has been input as possible. This will reduce the need for double entry of data when the new phased assessment is completed.

20.3 Identifying an assessment phase

The assessment reference number indicates if an assessment is a phase, and its phase number.

Every assessment on the system has a unique assessment reference number, which consists of the following elements as follows:

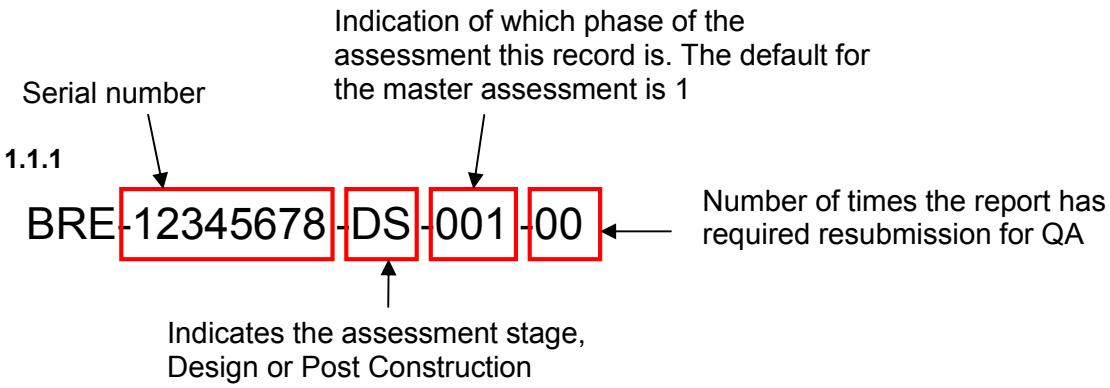
Indication of which phase of the assessment this record is. The default for the master assessment is 1
Serial number
1.1.1
BRE-12345678-DS-001-00
Number of times the report has required resubmission for QA
Indicates the assessment stage, Design or Post Construction

Fig 6. Assessment Reference Number Description

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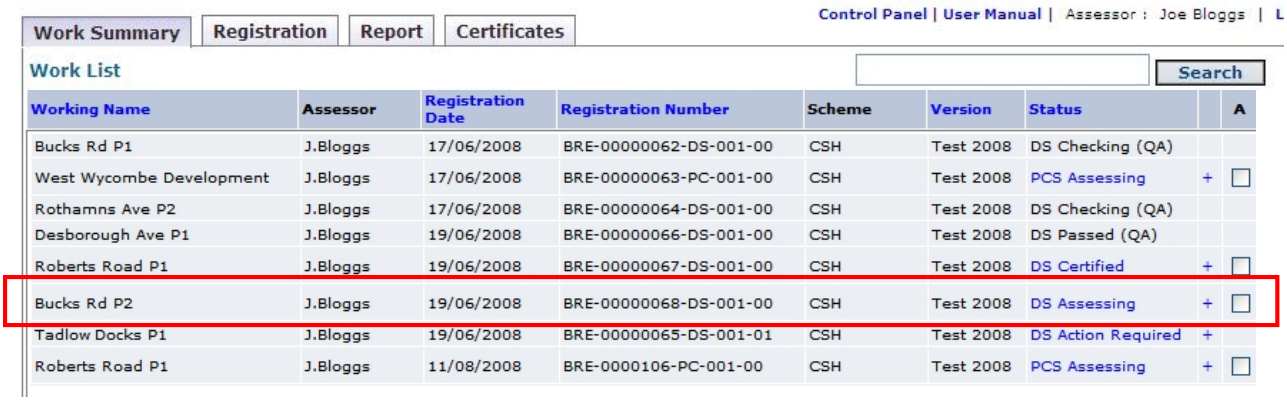
Step by step instructions

20.4 Creating a phase

Phasing functionality is accessed on the Dwelling Address tab of the specific assessment that requires phasing.

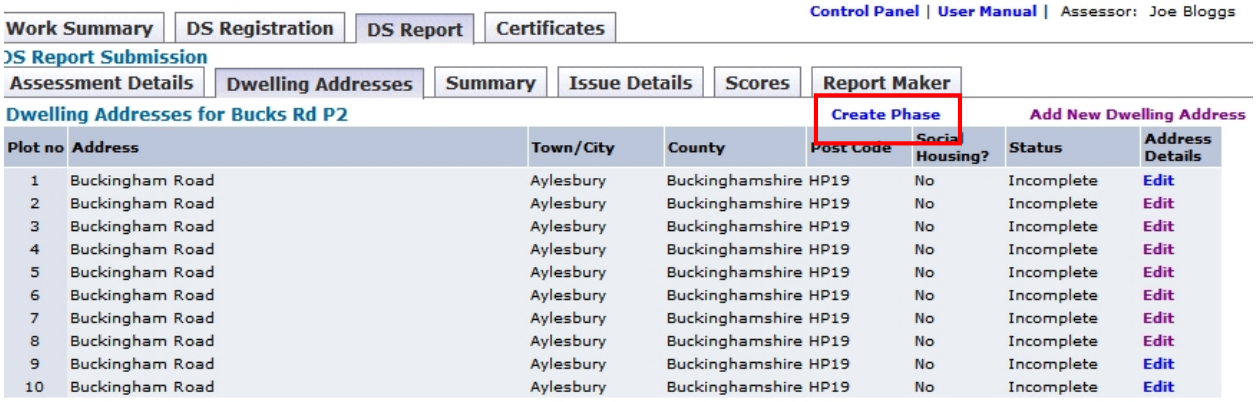
From the **Work Summary** screen, click on the appropriate assessment. Figure 7. below.



Working Name	Assessor	Registration Date	Registration Number	Scheme	Version	Status		A
Bucks Rd P1	J.Bloggs	17/06/2008	BRE-00000062-DS-001-00	CSH	Test 2008	DS Checking (QA)		
West Wycombe Development	J.Bloggs	17/06/2008	BRE-00000063-PC-001-00	CSH	Test 2008	PCS Assessing	+	☐
Rothamns Ave P2	J.Bloggs	17/06/2008	BRE-00000064-DS-001-00	CSH	Test 2008	DS Checking (QA)		
Desborough Ave P1	J.Bloggs	19/06/2008	BRE-00000066-DS-001-00	CSH	Test 2008	DS Passed (QA)		
Roberts Road P1	J.Bloggs	19/06/2008	BRE-00000067-DS-001-00	CSH	Test 2008	DS Certified	+	☐
Bucks Rd P2	J.Bloggs	19/06/2008	BRE-00000068-DS-001-00	CSH	Test 2008	DS Assessing	+	☐
Tadlow Docks P1	J.Bloggs	19/06/2008	BRE-00000065-DS-001-01	CSH	Test 2008	DS Action Required	+	
Roberts Road P1	J.Bloggs	11/08/2008	BRE-0000106-PC-001-00	CSH	Test 2008	PCS Assessing	+	☐

Fig 7. Work Summary Screen

Click on the **Dwelling Addresses** tab, and then the **Dwelling Addresses Summary** screen will be displayed. In the screen shot below, 10 dwelling addresses have already been added.



Plot no	Address	Town/City	County	Post Code	Social Housing?	Status	Address Details
1	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
2	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
3	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
4	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
5	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
6	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
7	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
8	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
9	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
10	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit

Fig 8. Dwelling Address Screen

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In order to begin phasing an assessment, dwelling addresses must be recorded.

Once dwelling addresses are recorded, click on the **Create Phase** link, at the top of the dwelling address table, Figure 8, above.

The assessment phasing address selection screen (**Manage Your Assessment** screen) is displayed, Figure 9., below.

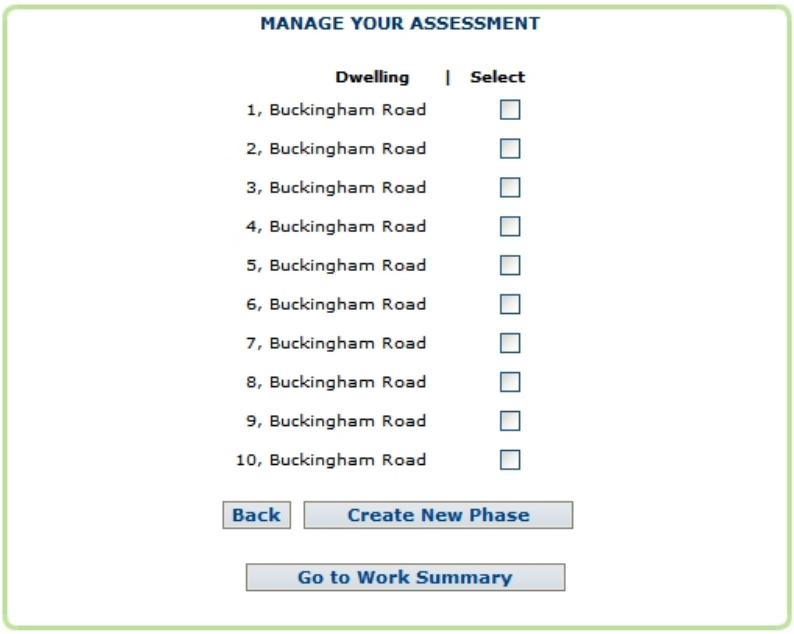

Fig 9. Phasing Address Selection Screen

This screen enables the system user to specify which dwellings should be moved into a new phase, of this assessment.

To move a dwelling or group of dwellings into an additional phase, tick the check box(es) as appropriate.

When all dwellings to be moved into the new phase report have been selected, click the **Create New Phase** button. In the example below, dwellings 6 to 10 will be moved into a new phase. Figure 10., below.

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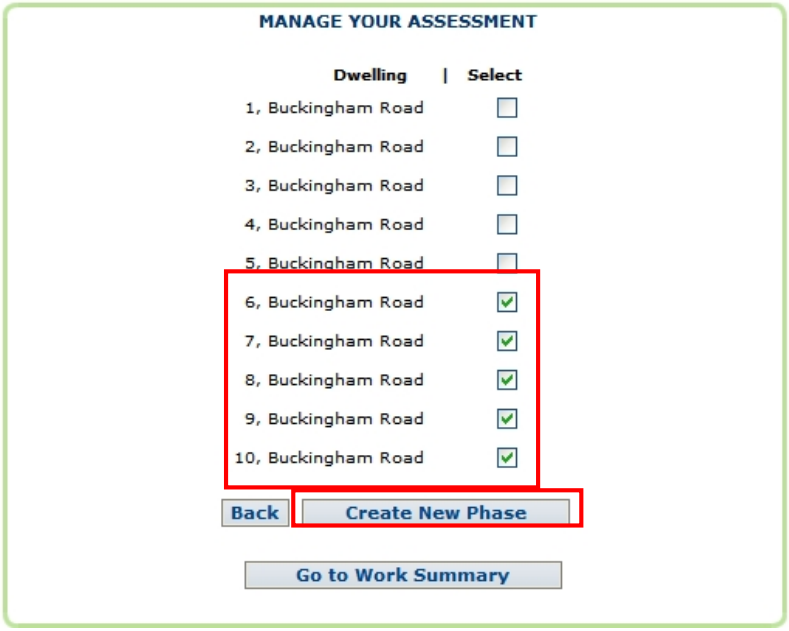

Fig 10. Phasing Address Selection Screen

The new phase will then be created, Figure 11., below.

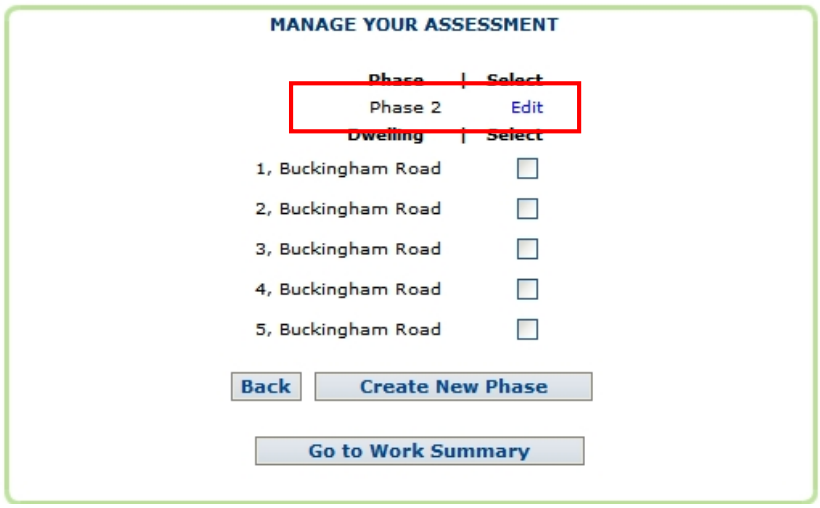

Fig 11. Phasing Address Selection Screen showing new phase

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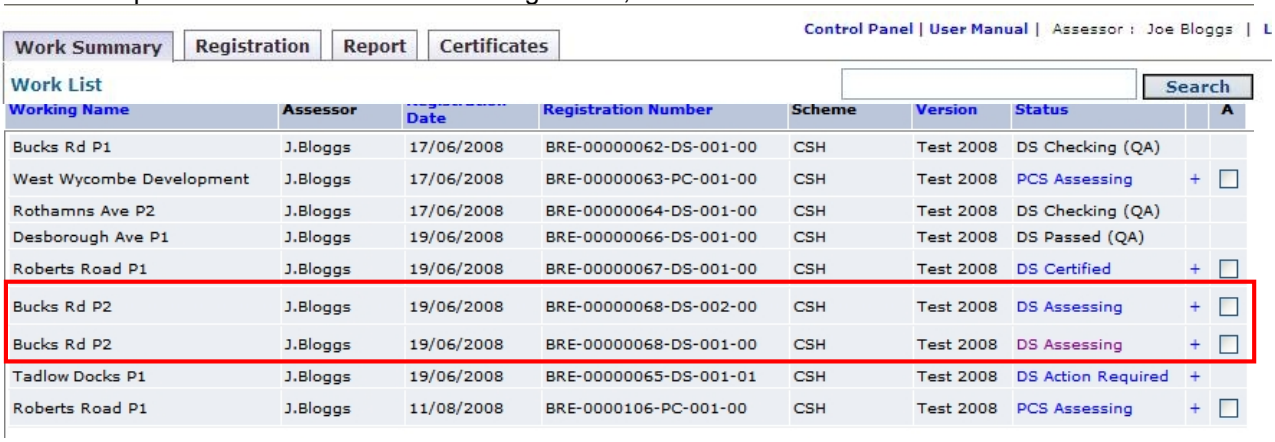
20.5 Viewing the new phase

The new phase can be viewed and accessed from the work summary screen in the usual way.

The new phase assessment is shown in Figure 12., below.

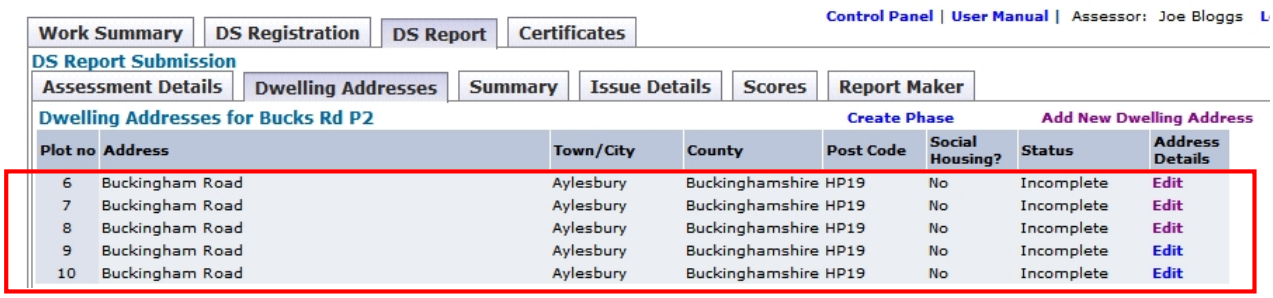


Working Name	Assessor	Date	Registration Number	Scheme	Version	Status		A
Bucks Rd P1	J.Bloggs	17/06/2008	BRE-00000062-DS-001-00	CSH	Test 2008	DS Checking (QA)		
West Wycombe Development	J.Bloggs	17/06/2008	BRE-00000063-PC-001-00	CSH	Test 2008	PCS Assessing	+	☐
Rothamns Ave P2	J.Bloggs	17/06/2008	BRE-00000064-DS-001-00	CSH	Test 2008	DS Checking (QA)		
Desborough Ave P1	J.Bloggs	19/06/2008	BRE-00000066-DS-001-00	CSH	Test 2008	DS Passed (QA)		
Roberts Road P1	J.Bloggs	19/06/2008	BRE-00000067-DS-001-00	CSH	Test 2008	DS Certified	+	☐
Bucks Rd P2	J.Bloggs	19/06/2008	BRE-00000068-DS-002-00	CSH	Test 2008	DS Assessing	+	☐
Bucks Rd P2	J.Bloggs	19/06/2008	BRE-00000068-DS-001-00	CSH	Test 2008	DS Assessing	+	☐
Tadlow Docks P1	J.Bloggs	19/06/2008	BRE-00000065-DS-001-01	CSH	Test 2008	DS Action Required	+	
Roberts Road P1	J.Bloggs	11/08/2008	BRE-0000106-PC-001-00	CSH	Test 2008	PCS Assessing	+	☐

Fig 12. Work Summary Screen showing original and new 'Phase' assessment

Note the number 002 (indicating phase 2) in the assessment reference number. Directly below the new phase 2 assessment is the original phase 1 assessment from which the phase 2 assessment was created.

When the **Dwelling Addresses** screen is opened for the new assessment phase, the dwelling addresses selected for the new phase are displayed, Figure 13., below.



Plot no	Address	Town/City	County	Post Code	Social Housing?	Status	Address Details
6	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
7	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
8	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
9	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit
10	Buckingham Road	Aylesbury	Buckinghamshire	HP19	No	Incomplete	Edit

Fig 13. New phasing addresses

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20.6 Editing a phase

The phasing management screen is used to make changes to a phase.

Changes to the dwellings selected and copied to the new phase can then be made.

To navigate back to the phasing management screen, first open the appropriate assessment from the **Work Summary** screen.

Once the phased assessment you wish to edit is accessed, navigate to the **Dwelling Addresses** screen, and select the **Create new Phase** link. The phasing management (**Manage Your Assessment**) screen will then be displayed. Click on the **Edit** link for the phase you wish to edit. Figure 14., below.

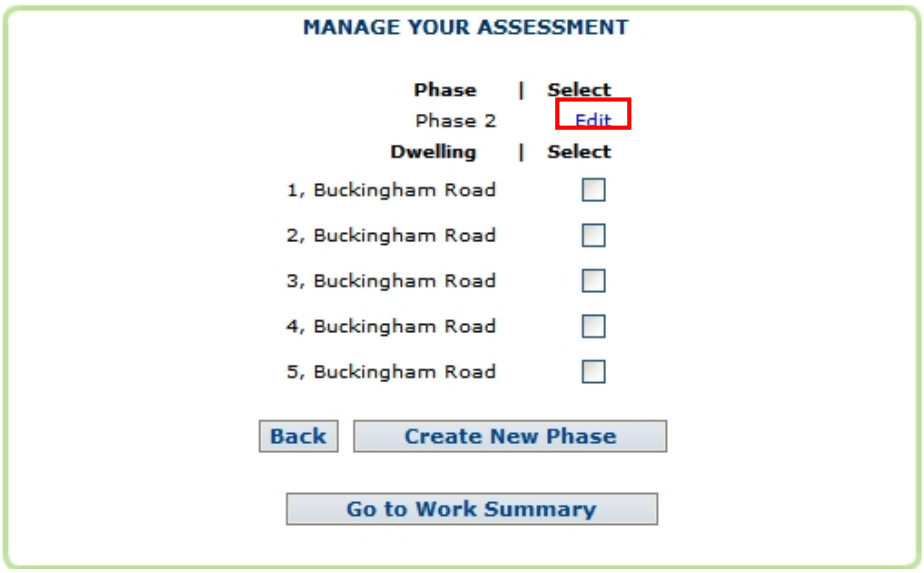

Fig 14. Phasing Address Selection/Management Screen

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The phasing management (**Manage Your Assessment**) screen will then display the dwellings allocated to that phase, you now have the ability to release each dwelling from that phase.

To release a dwelling(s) from the phase, tick the tick box associated with the dwelling you wish to 'release' back to the original assessment (phase 1), then click the **Update** phase button. The selected dwellings will then be returned to the original assessment, phase 1. Figure 15., below.

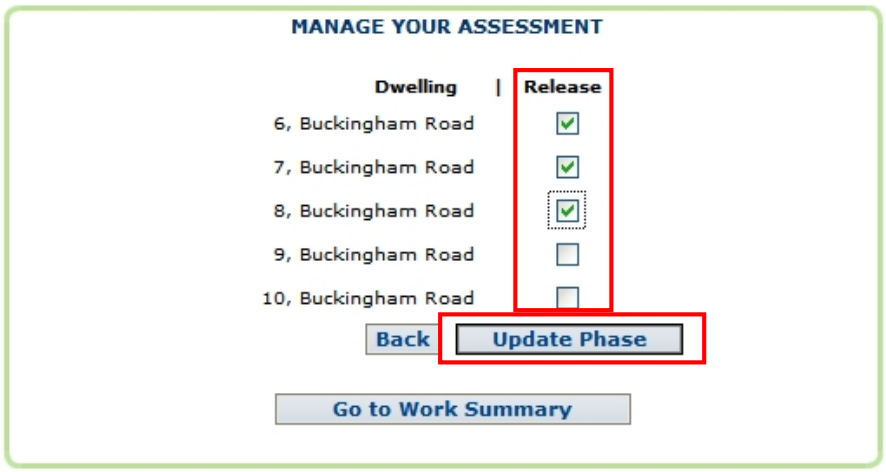

Fig 15, Phasing Address Selection/Management Screen

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Once updated, the user will be returned to the phasing management (**Manage Your Assessment**) screen, where the changes to associated dwellings in each phase will be displayed. Figure 16., below.

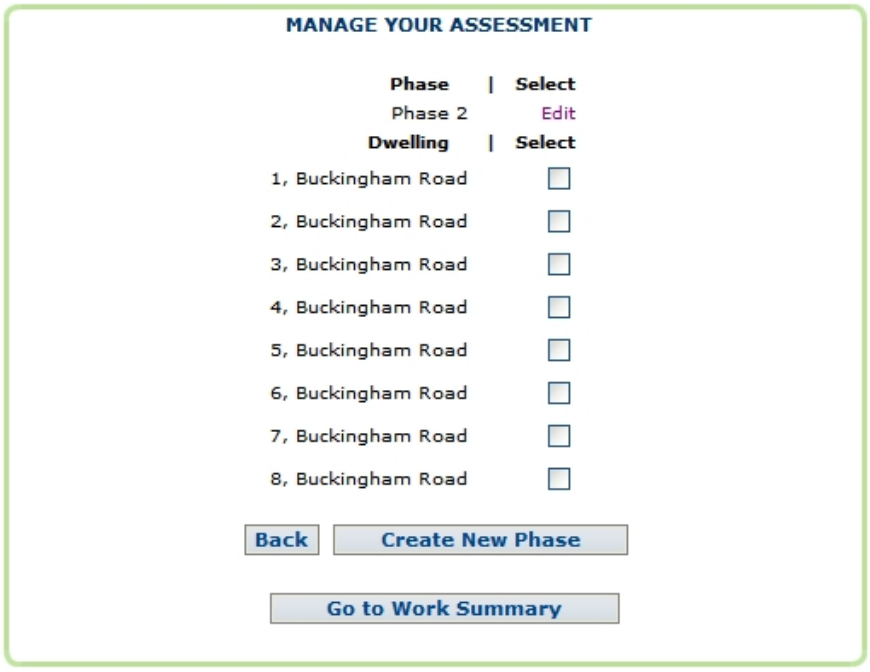

Fig 16. Phase Address Selection/Management Screen

20.7 Phasing – best practice

As phasing is a new function of the system, care must be taken to avoid confusion. It is recommended that assessors familiarise themselves with the phasing functionality by experimenting on the training system, before attempting to phase a live assessment, on the live system.

Recommended practices when phasing assessments on the system;

- Where possible, always enter as much data as possible on the original registered assessment, before creating any phases. This will help to reduce double entry of assessment data later when other phases are completed.

- All phases must be made from a single 'master' assessment. This will be phase one (001). The system does not provide the ability to create a phase from a phase.

- Design stage assessments should not be phased if it is intended to be copied over to post construction.

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